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FOREIGN NEWS ON APPLES

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SUMMARY OF THE APPLE EXPORT SEASON, 1931-32

(With a brief summary of the pear, plum and grape seasons)

by

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SUMMARY

The season under review was one of many vicissitudes. It opened with large crops in prospect both in America and in Europe. American shippers were faced with the problem of disposing of a large share of their product in Europe where apple and pear stocks, with the exception of England, were plentiful. In addition demand conditions were poor. To add to the difficulties, the season had hardly gotten well under way when the United Kingdom went off the gold standard, to be followed shortly by the Scandinavian countries. The market situation was further complicated by the heavy quantities of apples that were landed in poor condition.

This combination of factors resulted in a low price level for apples throughout most of the season. In the spring when supplies were diminished and prices could normally be expected to rise a duty of 10 per cent ad valorem was placed on apples and pears from other than Empire countries entering the United Kingdom. Shortly afterward France imposed stringent sanitary requirements upon imported fruit.

Some other significant developments of the season were the improvement in the Nova Scotian apple pack, the marked preference exhibited by buyers for the higher grades of apples, the inauguration of the chartered ships as a carrier for United States barreled apples, and the large increases in the imports of American apples and pears by France.

The 2,855,000 barrels and 9,465,000 boxes of apples exported during the season were larger than the average exports for the past five seasons but less than the 2,764,000 barrels and 12,050,000 boxes exported in 1930-31. Europe took a larger proportion of the shipments than usual, the total being 2,791,000, or 98 per cent of the barrels, and 8,449,000 or 89 per cent of the boxes. The balance went mainly to Canada, Latin America and Asiatic countries.



APPLESThe market situation

It was again demonstrated in the 1931-32 season that no two seasons are identical. Unlike the previous year, when a short barreled apple crop was in prospect in the United States and an almost complete crop failure prevailed throughout Europe, the season opened with eastern growers facing the problem of marketing one of the largest barreled crops on record in markets which were already depressed with local supplies. The boxed apple crop was also of good size. Coupled with the larger supply were the poor demand conditions prevailing in most markets.

Early in the season producers in the eastern states, particularly those embracing the Shenandoah-Cumberland, became greatly concerned over their market possibilities. Crops were heavy and the extremely high temperatures prevented the fruit from coloring; also, in certain districts, the quality was not particularly promising. Because of the large crop, growers on both seaboard were faced with the necessity of disposing of large amounts abroad. Anticipating the heavy consignments of apples to Europe many foreign buyers, who usually go to America to marshall their supplies, remained at home.

To make matters worse domestic buyers were slow in making purchases and demand at anything like satisfactory prices was almost entirely lacking. Growers in many cases became panicky and the usual cry went around to the effect that apples were plentiful and that extremely low prices could be expected. Consequently, many growers, especially in the east, took the advice of exporting agents and shipped large quantities of fruit abroad under a small guarantee. Such shipments were, in many cases, withdrawn from ordinary storage and of questionable condition at the time of shipment. The additional handling, high temperatures, and long ocean voyage did not add anything to this condition. Early barreled varieties like Grimes Golden, Jonathans and King David, among the barreled lots, were harvested and shipped under conditions which were far from beneficial to the fruit. Those that were shipped common stowage arrived in Europe overheated, cooked and very wasty. Boxed apples in many instances were also shipped over early in the season without refrigeration and arrived in a generally unsatisfactory condition. These shipments were landed on an already overloaded market. The poor condition of the cargoes discouraged importers; they soon lost confidence and the market became very much depressed.

Certain far-sighted leaders proposed early in the season that only the best grades be packed and that those of questionable nature be disposed of in some other manner. It was further suggested that the lower grades and unclassified fruit should not be sent abroad to compete with the better grades. These suggestions, which were sound, were in many instances disregarded. The results can only be judged by the returns for such fruit, which are too familiar to many shippers to be easily forgotten.

Weather conditions played an important role in the marketing and distribution of the 1931 crop. The prolonged autumn permitted the harvesting of apples, which, under normal conditions, would not have been gathered. These apples were sent to already over-supplied markets and placed in direct competition with supplies handled in the ordinary way. In addition the mild winter which prevailed throughout the greater part of the United States was



not conducive to fruit consumption. Consequently apples had to compete with heavy quantities of other fruit on a listless market.

In Europe the poor market conditions did not start with the arrival of apples. In fact, difficulties commenced at the very opening of the soft fruit season. Strawberries were the first fruit to get into trouble. The crop was abundant and despite the high favor in which this berry is held, the heavy supply had its effect and prices tumbled. In addition to the liberal home supplies, substantial quantities were brought in from Holland and France where large crops were also produced. These additional supplies swamped the market and prices were forced down to disastrous levels. This condition continued for about four weeks and was referred to by the trade as "strawberryitis". Supplies at times were so plentiful that growers were unable to secure baskets. Some days Covent Garden was offering two-pound baskets for 3 pence to 6 pence (6 cents to 13 cents) apiece.

During the July strawberry season other soft fruits were also plentiful, cherries and peaches in particular. The local cherry supplies were augmented by heavy receipts from several continental countries, mainly Holland, Belgium, France, Italy and Germany. The liberal quantities on offer resulted in low prices for cherries. Moreover the markets of the United Kingdom were stocked with the heaviest quantity of peaches on record. Italy and Spain were the chief sources of supply. The adoption of currency restrictions in Germany caused the diversion of hundreds of cars of fruit, mostly peaches and apricots destined for that market, to other countries. A large share of this fruit, together with some from other countries including the United States, was stopped en route to Germany and re-directed to London and other United Kingdom ports. As a result of the German situation, London and surrounding markets were called upon to absorb quantities several times their normal capacity. Prices naturally were ruinous to both shipper and receiver. Italian peaches sold for less than carrying charges, while importers lost heavily on f.o.b. purchases or shipments covered by guaranteed advances.

Not only were supplies of European soft fruits heavy in 1931, but all the principal apple-producing countries, with the exception of England, came through the spring with abundant fruit crops in prospect. The bloom was plentiful everywhere, pollination conditions were good and the trees set a heavy crop. Adverse weather conditions in England affected tree fruits, but small fruits, as previously mentioned, were abundant. Holland and Belgium had generally good crops of both apples and pears, particularly the former country. France had a light crop, especially of table sorts, but to offset this, Switzerland produced the heaviest crop on record, while Germany harvested a good yield of practically all fruits. Local supplies in the Scandinavian countries, however, were short. In addition to the heavier European apple crops the Canadian crop was larger than usual. Other competing fruits such as oranges were also plentiful and cheap throughout the season.

Early in August American apples started to arrive on the British markets in face of the heavier competing supplies of apples and other fruits. These arrivals consisted largely of summer varieties many of which, as mentioned earlier, were landed in variable condition. Because of high transportation charges and the desire to effect every possible economy, soft varieties were shipped ordinary stowage instead of refrigeration. Results were disastrous. Despite the low prices received for fruit shipped ordinary



stowage early in the season shipments continued to arrive without refrigeration right through the warm fall weather with similar results as to price. (See illustration, 43)

Not only was the supply situation unfavorable in the 1931-32 season but many factors operated to reduce the demand for American fruit. The most important of these was the departure of the United Kingdom from the gold standard in September. Following this occurrence the markets registered a great state of confusion. Importers, exporters, brokers, buyers, in fact, everyone connected with the fruit trade, seemed for a time to have lost all sense of values. Importers did not know what to do about their contracts. Some were repudiated, others elected to see them through. Purchases were reduced to a hand-to-mouth basis since no one cared to build up stocks or to lay in supplies in excess of immediate requirements. The fluctuating rate of exchange added to the confusion.

In many European countries the fruit industries were encouraged by providing tariffs, embargoes, restrictions and quarantine measures. Last season the increase in duties in a number of countries served as a deterrent to apple imports. In Norway the duty on apples was raised to 60 øre per kilo (4.9 cents per pound) plus 20 per cent from August 1 to January 31, and 40 øre the kilo (3.3 cents per pound) plus 20 per cent from February 1 to July 3. In Sweden apples carry a duty of 20 øre per kilo (1.7 cents per pound) whereas oranges are free. The duty of 1 øre per kilo (one-tenth of a cent per pound) in Denmark this year was raised to 5 øre per kilo (one-half of a cent per pound). In a number of countries, particularly Germany, Austria, and Czechoslovakia, imports were greatly curtailed by tightening up of credits and by restricting the amount of exchange for payment of imported goods.

During the season England passed from a nation of free traders to one of protective tariffs. Abnormal import duties were placed upon certain commodities which, in some instances, constituted a total prohibition. Apples and pears, were subjected to only a 10 per cent duty, which is not considered detrimental by the trade but the elasticity of the order has had a dampening effect upon future commitments. This is because buyers did not feel like obligating themselves in the face of a possible increase in the duty. On the other hand it is felt that, by imposing a 10 per cent tariff, more care will be exercised in the packing of fruit for export; also that it will restrict somewhat the shipment of low-grade fruit in a similar manner to the apple embargo of June, 1930, ordinarily spoken of as the "Raw Apple Order".

This order is an embargo against the importation of American apples of other than the two highest grades between July 7 and November 15. It is the general consensus of opinion among British apple importers that the Apple Order has, on the whole, been beneficial because it excludes low grade United States apples when the British markets are heavily supplied with such fruit from home orchards and nearby countries. During 1931, however, because of the heavy European crop which restricted the movement of our fruit, the lower grades were allowed to accumulate in the United States until after the English embargo was lifted on November 15. The lifting of the embargo resulted in an immediate influx of the excluded grades. The trade generally attributed the low prices which prevailed throughout the

latter part of November and December to this movement. It is noteworthy that the United Kingdom markets held up quite well and maintained a fairly even keel as long as the Order remained in force.

In March, France adopted a decree requiring that all fruit imported from certain countries, including the United States, Canada, Australia and New Zealand must be accompanied by a Federal certificate stating that it is free of disease or parasites, particularly San Jose scale. In addition fruit with the exception of citrus has to stand inspection in France. Fortunately these regulations were not adopted until toward the end of the season, otherwise the takings of United States fruit would have been much less than they were. This decree practically excluded barreled apples from that market after March 8 and seriously disrupted the boxed apple movement.

Taking the season as a whole prices were quite well maintained, considering the heavy fruit supplies available throughout the year and the generally poor demand conditions, such as adverse exchange rates, increased duties, import regulations and low purchasing power. Barreled apple prices, considering quantities offered and the quality and condition of the fruit, were about as good as could be expected. Boxed apples, however, have had greater difficulties, partly no doubt because low purchasing power made it impossible for many consumers to pay the usual premium for this fruit.

#### Volume and distribution of United States apple exports

Apples exported from the United States in the 1931-32 season totaled 18,032,000 bushels against 20,341,000 bushels last season and the five-year average, 1926-27 to 1930-31, of 16,477,000 bushels. About 9,466,000 boxes and 2,855,000 barrels were exported in 1931-32 compared with 12,050,000 boxes and 2,764,000 barrels in 1930-31. Exports of both boxed and barreled apples were above the average for the five-year period under survey. (See table, page 9.)

Approximately 17 per cent of the United States commercial apple crop was exported in 1931-32, compared with 20 per cent in the 1930-31 season and 16½ per cent for the five-year period, 1927-28 to 1931-32. The proportion of the commercial boxed apple crop was the largest on record, amounting to almost 25 per cent against 23 per cent last year and the five-year average of 20½ per cent. Barreled apple exports fell below the proportion exported in the preceding year. The total movement amounted to around 13 per cent of the crop as against 17 per cent in 1930-31 and the five-year average of 13 per cent. (See table, page 8.)

In the 1931-32 season 16,822,000 bushels of apples, or 93 per cent of the total exports went to Europe. This compares with 18,187,000 bushels, or 89 per cent, in 1930-31 and 14,177,000 bushels, or 86 per cent of the average exports, in the five-year period 1926-27 to 1930-31. Exports to the United Kingdom in the season just closed amounted to 9,192,000 bushels, or 51 per cent of the total shipments; Germany took 2,224,000 bushels, or 12 per cent; France 2,040,000 bushels, or 11 per cent; the Netherlands 1,449,000 bushels, or 8 per cent; Belgium 663,000 bushels, or 3.7 per cent; Denmark 470,000 bushels, or 2.6 per cent; Sweden 468,000 bushels, or 2.6 per cent; Norway 132,000 bushels, or .7 per cent; and all other Europe



185,000 bushels, or 1 per cent. The outstanding development of the season was the large increase in takings by France. Exports to that country were double those of the preceding season. There was a decided decline in exports to Canada and the Latin American countries, whereas most European countries took about the usual quantities. Shipments to Canada amounted to 347,000 bushels, those to Argentina 192,000 bushels, Brazil 170,000 bushels and all other countries 544,000 bushels.

Boxed apple exports in 1931-32 were a little above average, amounting to 9,466,000 boxes compared with the five-year average of 8,661,000 boxes but below those of 1930-31 when exports reached 12,050,000 boxes. Exports to the United Kingdom totaled 3,475,000 boxes, or 37 per cent of the boxed exports. Germany absorbed 1,988,000 boxes, or 21 per cent; the Netherlands 1,303,000 boxes, or 14 per cent; France 913,000 boxes, or 10 per cent; Denmark 251,000 boxes, or 2.7 per cent; Sweden 216,000 boxes, or 2.3 per cent; Norway 75,000 boxes, or .8 per cent; and 145,000 boxes, or 1.5 per cent went to all other European countries. Of the remainder about 237,000 boxes, or 2.5 per cent were shipped to Canada; 167,000 boxes, or 1.8 per cent to Argentina; 127,000 boxes, or 1.3 per cent to Brazil; and 486,000 boxes, or about 5 per cent to all other countries. Europe took larger than average quantities of boxed apples this season. This was mainly due to the increased amounts shipped to France, Denmark and Sweden. Shipments to Canada and Latin American countries were below average and less than those of the preceding year. (See table, page 9.)

About 2,855,000 barrels of apples were exported in 1931-32, compared with 2,764,000 barrels in 1930-31 and 2,605,000 barrels in the five-year period 1926-27 to 1930-31. Exports to the United Kingdom amounted to 1,906,000 barrels, or 67 per cent of the barreled exports; shipments to France totaled 375,000 barrels, or 13 per cent; Belgium 193,000 barrels, or 7 per cent; Sweden 84,000 barrels, or 2.9 per cent; Germany 79,000 barrels, or 2.8 per cent; Denmark 73,000 barrels or 2.6 per cent; the Netherlands 49,000 barrels, or 1.7 per cent; Norway 19,000 barrels, or .7 per cent; and all other Europe 13,000 barrels, or .5 per cent. Shipments to the United Kingdom and France were considerably above average and larger than those of the preceding season. On the other hand Germany and the Netherlands took much smaller quantities than usual. Exports to Belgium were a little above average and those to the Scandinavian countries about average. Canada took around 37,000 barrels, or about half the usual amount. Exports to the Latin American countries, mainly Argentina, were very small. In the case of the Argentine it was due in part to the stringent sanitary regulations in force in that country. (See table, page 9.)

It is of interest to note that the exports to the Continent are largely influenced by local crop conditions. The 1930 crop on the Continent was short and imports from America in the 1930-31 season were very large. During the past season, local supplies were heavy, which meant a smaller import from this country. Growers and shippers will find it to their advantage to base their export policy upon crop conditions in/relative Continental European countries to which shipments are contemplated. Incidentally, reports received to date indicate that the 1932 European crops will be small except in Italy and Austria where very good apple crops are expected.



APPLES: Production and exports, barreled, boxed and total,  
United States and Canada, 1922-23 to 1932-33

Marketing year July-June	Total United States			U. S. boxed apples			U. S. barreled apples		
	Commer-	Ex-	Per	Commer-	Ex-	Per	Commer-	Ex-	Per
	cial	ports	cent of	cial	ports	cent of	cial	ports	cent of
	crop	ports	crop	crop	ports	crop	crop	ports	crop
	a/		ex-	a/		ex-	a/		ex-
			ported			ported			ported
	Million:	Million:	Per	Million:	Million:	Per	Million:	Million:	Per
	bushels:	bushels:	cent	bushels:	bushels:	cent	bushels:	bushels:	cent
1922-23...	95.8:	5.3:	5.5:	38.1:	3.5:	9.2:	57.7:	1.8:	3.1
1923-24...	107.8:	12.3:	11.4:	49.8:	6.2:	12.4:	58.0:	6.1:	10.5
1924-25...	84.0:	9.6:	11.4:	33.2:	5.1:	15.4:	50.8:	4.5:	8.9
1925-26...	99.7:	11.0:	11.0:	43.0:	5.4:	12.6:	56.7:	5.6:	9.9
1926-27...	117.4:	21.3:	18.1:	44.5:	7.8:	17.5:	72.9:	13.5:	18.5
Average...	100.9:	11.9:	11.8:	41.7:	5.6:	13.4:	59.2:	6.3:	10.6
1927-28...	78.1:	9.4:	12.0:	38.6:	5.4:	14.0:	39.5:	4.0:	10.1
1928-29...	106.4:	21.0:	19.7:	51.0:	12.0:	23.5:	55.4:	9.0:	16.2
1929-30...	86.5:	10.3:	11.9:	39.7:	6.0:	15.1:	46.8:	4.3:	9.2
1930-31...	101.0:	20.3:	20.0:	51.9:	12.0:	23.1:	49.1:	8.3:	16.9
1931-32...	104.2:	18.0:	17.3:	38.4:	9.5:	24.7:	65.8:	8.5:	12.9
Average...	95.2:	15.8:	16.6:	43.9:	9.0:	20.5:	51.3:	6.8:	13.3
1932-33...	90.5:	:	:	47.9:	:	:	42.6:	:	:
Marketing year July-June	Total Canadian			Canadian boxed apples			Canadian barreled apples		
	Crop	Ex-	Per	Crop	Ex-	Per	Crop	Ex-	Per
		ports	cent of		ports	cent of		ports	cent of
			crop			crop			crop
			ex-			ex-			ex-
			ported			ported			ported
	Million:	Million:	Per	Million:	Million:	Per	Million:	Million:	Per
	bushels:	bushels:	cent	bushels:	bushels:	cent	bushels:	bushels:	cent
1922-23...	11.7:	4.7:	40.2:	2.8:	b/	b/	8.9:	b/	b/
1923-24...	11.5:	4.9:	42.6:	3.3:	b/	b/	8.2:	b/	b/
1924-25...	8.9:	4.2:	47.2:	2.7:	b/	b/	6.2:	b/	b/
1925-26...	8.9:	4.3:	48.3:	2.8:	b/	b/	6.1:	b/	b/
1926-27...	8.8:	3.1:	35.2:	3.9:	b/	b/	4.9:	b/	b/
Average...	10.0:	4.2:	42.0:	3.1:	b/	b/	6.9:	b/	b/
1927-28...	8.4:	2.8:	33.3:	3.2:	b/	b/	5.2:	b/	b/
1928-29...	9.7:	3.3:	34.0:	4.4:	1.0:	22.7:	5.3:	2.3:	43.4
1929-30...	11.8:	5.6:	47.5:	3.3:	.8:	24.2:	8.5:	4.8:	56.5
1930-31...	10.2:	4.7:	46.1:	4.3:	1.3:	30.2:	5.9:	3.4:	57.6
1931-32...	11.4:	5.0:	43.9:	3.4:	b/	b/	7.5:	b/	b/
Average...	10.3:	4.3:	41.7:	3.7:	b/	b/	6.5:	b/	b/
1932-33...	10.3:	:	:	4.4:	:	:	5.9:	:	:

Compiled by the Foreign Agricultural Service from official sources. a/ Commercial apple crop or that portion of the total crop sold for fresh consumption. b/ Not available.



APPLES: United States exports, by countries, marketing years, 1926-27  
to 1931-32 and the five-year average, 1926-27 to 1930-31

Country	1926-27	1927-28	1928-29	1929-30	1930-31 a/	Average 1926-27 1930-31	1931-32 b/
	1,000 barrels	1,000 barrels	1,000 barrels	1,000 barrels	1,000 barrels	1,000 barrels	1,000 barrels
United Kingdom.....	3,304.9	1,004.4	1,720.0	953.1	1,002.0	1,595.9	1,905.6
Germany.....	361.6	27.5	236.1	50.0	473.5	229.8	78.6
Netherlands.....	140.9	1.7	200.5	16.5	392.0	150.3	48.6
France.....	3.5	-	61.5	8.2	172.0	49.0	375.5
Belgium.....	80.3	1.1	321.4	13.7	380.0	159.3	193.2
Sweden.....	72.4	82.4	114.7	96.8	35.6	80.4	84.0
Norway.....	28.8	20.0	25.3	23.2	11.6	21.8	19.1
Denmark.....	150.8	42.1	81.2	41.5	65.6	76.2	73.0
Other Europe.....	11.1	5.1	25.7	6.3	18.7	13.4	13.4
Total Europe.....	4,154.3	1,184.3	2,786.4	1,209.3	2,551.0	2,377.1	2,791.0
Canada.....	157.6	54.6	62.8	40.3	40.1	71.1	36.7
Mexico.....	2.5	1.7	3.1	2.2	2.0	2.3	.1
Cuba.....	18.6	11.3	10.7	8.9	3.8	10.7	4.8
Brazil.....	7.3	2.4	1.6	1.4	.2	2.5	-
Argentina.....	118.9	82.2	125.4	152.5	156.9	127.2	8.1
Others.....	23.5	11.9	15.3	12.4	9.6	14.5	14.6
Total.....	4,482.7	1,348.5	3,005.3	1,427.0	2,763.6	2,605.4	2,855.3
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
United Kingdom.....	3,722.7	2,708.7	4,835.6	2,654.8	3,846.0	3,553.6	3,475.1
Germany.....	1,236.7	736.6	2,695.0	946.2	3,269.5	1,776.8	1,988.1
Netherlands.....	670.2	71.9	1,687.3	271.7	2,244.0	989.0	1,303.3
France.....	5.7	.6	76.9	49.4	553.0	137.1	913.0
Belgium.....	16.2	3.9	65.2	9.5	47.5	28.5	83.3
Sweden.....	196.2	218.2	337.4	268.8	164.5	237.0	215.8
Norway.....	95.1	101.2	84.0	91.2	94.9	93.3	74.6
Denmark.....	156.5	143.8	193.3	100.6	198.6	158.6	250.9
Other Europe.....	42.8	39.9	82.3	78.7	116.7	72.1	144.7
Total Europe.....	6,142.1	4,024.8	10,057.3	4,470.9	10,534.7	7,046.0	8,448.8
Canada.....	729.7	541.8	636.3	499.9	475.0	576.5	237.2
Mexico.....	98.8	75.1	114.5	75.1	62.6	85.2	3.4
Cuba.....	92.1	60.0	67.7	47.2	55.4	64.5	33.8
Brazil.....	172.3	115.0	211.9	192.1	169.7	172.2	126.7
Argentina.....	154.5	226.9	335.9	294.4	257.0	253.8	167.3
Others.....	454.6	340.7	602.9	418.1	495.2	462.3	448.8
Total.....	7,844.1	5,384.3	12,026.5	5,997.8	12,049.7	8,660.5	9,466.0
Grand total in terms of boxes.....	21,292.2	9,429.9	21,042.6	10,278.9	20,340.6	16,476.9	18,031.9

Compiled from official records of the Bureau of Foreign and Domestic Commerce.

a/ Adjusted approximately to include baskets with barrels and to remove them from the boxed exports. b/ Preliminary; baskets exported from January to June have been included with the barrels.

UNITED STATES: Boxed apple exports by months, 1926-27 to 1931-32  
and the five-year average, 1926-27 to 1930-31

Month	1926-27	1927-28	1928-29	1929-30	1930-31	Average	
						1926-27	1931-32
						to	
						1930-31	
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	boxes	boxes	boxes	boxes	boxes	boxes	boxes
July.....	201.6	101.3	235.6	91.0	233.0	172.5	421.4
August.....	272.8	378.3	411.2	261.5	417.9	348.3	496.3
September.....	546.2	248.0	347.5	241.7	509.4	378.6	513.7
October.....	1,256.1	836.2	2,353.1	771.8	1,548.0	1,353.0	1,108.5
November.....	1,589.7	1,136.8	1,821.2	1,324.6	2,431.8	1,660.8	1,111.3
December.....	1,056.5	785.5	1,082.3	986.5	2,116.4	1,205.4	667.5
January.....	854.2	841.8	1,790.6	827.8	1,488.4	1,160.6	1,541.3
February.....	1,054.7	504.4	1,598.5	714.6	1,459.4	1,066.3	1,595.0
March.....	497.4	335.6	1,466.1	473.4	1,819.6	918.4	994.0
April.....	326.9	93.7	727.7	160.5	607.0	383.2	490.0
May.....	125.1	74.5	92.2	109.9	209.2	122.2	350.3
June.....	62.9	48.3	100.5	34.5	64.2	62.1	176.7
Total.....	7,844.1	5,384.3	12,026.6	5,997.8	12,904.2	8,831.4	9,466.0

Compiled by the Foreign Agricultural Service from official records of the Bureau of Foreign and Domestic Commerce.

UNITED STATES: Barreled apple exports by months, 1926-27 to 1931-32  
and the five-year average, 1926-27 to 1930-31

Month	1926-27	1927-28	1928-29	1929-30	1930-31	Average	
						1926-27	1931-32
						to	a/
						1930-31	
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	barrels	barrels	barrels	barrels	barrels	barrels	barrels
July.....	8.0	14.3	11.7	25.4	14.4	14.7	22.3
August.....	31.7	48.6	40.9	33.1	9.6	32.8	19.1
September.....	367.8	143.3	78.7	124.8	123.5	167.6	295.9
October.....	497.8	353.9	632.1	423.3	481.3	477.7	612.0
November.....	1,192.6	382.9	544.6	274.2	686.6	616.2	631.6
December.....	474.1	188.4	303.4	193.3	422.6	316.3	284.7
January.....	642.6	123.0	458.2	160.2	299.6	336.7	389.0
February.....	451.7	52.9	377.9	77.4	225.9	237.2	357.7
March.....	481.9	29.3	373.3	90.0	178.4	230.6	196.5
April.....	250.8	7.3	124.4	22.0	31.8	87.3	32.5
May.....	63.9	4.5	13.2	2.5	4.3	17.7	11.0
June.....	19.8	.2	46.9	.9	.6	13.7	3.1
Total.....	4,482.7	1,348.5	3,005.3	1,427.0	2,478.8	2,548.5	2,855.3

Compiled by the Foreign Agricultural Service from official records of the Bureau of Foreign and Domestic Commerce.

a/ Since January baskets have been reported separately. These have been included with the barrels.



UNITED STATES: Apple exports, by customs districts, 1926-27  
to 1931-32 and the five-year average 1926-27 to 1930-31

Customs district	Season July-June						Average:	
	1926-27	1927-28	1928-29	1929-30	1930-31		1926-27:	1931-32
							to	1930-31:
	Thou-	Thou-	Thou-	Thou-	Thou-	Thou-	Thou-	Thou-
	sands	sands	sands	sands	sands	sands	sands	sands
<b>BOXES</b>								
New York (City).....	2,989:	2,212:	3,996:	1,694: <u>a/</u>	2,924:	2,763:		2,164
Washington (Seattle):	1,784:	1,366:	4,052:	2,523:	5,126:	2,970:		4,664
Oregon (Portland)...	1,688:	684:	2,287:	709:	2,358:	1,545:		1,143
San Francisco.....	275:	405:	622:	350:	849:	500:		1,002
Michigan.....	483:	315:	589:	340:	367:	419:		223
Maine and New Hamp- shire.....	22:	11:	39:	30:	32:	27:		12
Philadelphia.....	2:	0:	0:	0:	0:	0:		0
Maryland (Balti- more).....	0:	<u>b/</u> 1:	<u>c/</u> 1:	1:	1:	1:		117
Florida.....	91:	60:	76:	35:	30:	58:		28
San Antonio.....	49:	27:	47:	17:	15:	31:	<u>d/</u>	
All others.....	459:	303:	318:	309:	348:	347:		113
Total.....	7,842:	5,384:	12,027:	5,998: <u>a/</u>	12,050:	8,661:		9,466
<b>BARRELS</b>								
New York (City).....	3,906:	1,213:	2,855:	1,275: <u>a/</u>	2,609:	2,372:		2,318
Maryland (Balti- more).....	<u>e/</u> 3:	3:	<u>d/</u>	0:	0:	1:		339
Maine and New Hamp- shire.....	94:	51:	36:	43:	43:	53:		12
Philadelphia.....	25:	<u>d/</u>	6:	2:	1:	7:		3
Florida.....	14:	10:	10:	9:	3:	9:		1
Michigan.....	17:	5:	8:	2:	2:	7:		6
All others.....	424:	67:	90:	96:	106:	156: <u>f/</u>		176
Total.....	4,483:	1,349:	3,005:	1,427: <u>a/</u>	2,764:	2,605:		2,855
<b>Total in bushels <u>g/</u></b>								
New York (City).....	14,706:	5,850:	12,561:	5,520:	10,752:	9,878:		9,117
Washington (Seattle):	1,784:	1,366:	4,052:	2,523:	5,126:	2,970:		4,664
Oregon (Portland)...	1,688:	684:	2,287:	709:	2,358:	1,545:		1,143
San Francisco.....	275:	405:	622:	350:	849:	500:		1,002
Michigan.....	534:	330:	612:	345:	372:	439:		240
Maryland (Balti- more).....	9:	10:	1:	1:	1:	4:		1,135
All others.....	2,296:	785:	908:	831:	883:	1,141:		731
Total.....	21,292:	9,430:	21,043:	10,279:	20,341:	16,477:		18,032

Compiled by the Foreign Agricultural Service from the official records of the Bureau of Foreign and Domestic Commerce.

a/ Basket exports of 854,000 have been added to the New York barreled exports and deducted from the boxed exports from New York. This was necessary since basketed exports had been erroneously included with boxed exports. b/ Calendar year 1927. c/ Calendar year 1928. d/ Less than 500 barrels. e/ International Apple Association report. f/ Includes the equivalent of 128,000 barrels shipped from Virginia ports. g/ Bushels of 44 pounds or the equivalent of one box or basket.

Boxed apples

The 1930 crop possessed splendid keeping quality and certain varieties were available on most markets until late in the season. On the first of August 1931 some very good parcels of Winesaps were on offer and met with a very favorable reception. In Liverpool, especially, some fine lots were observed, being of splendid color and in good hard condition. During the last week in July the market ruled at from 12/- to 13/9 (\$2.92 to \$3.34) per box, depending upon size and grade. Certain lots examined had every possibility of holding up for another three to four weeks. In France, Winesaps during the last week in July 1931 were selling out of storage at 125 francs per box (\$5.00). Incidentally, some of this fruit arrived in Paris on November 10, 1930.

The first shipment of the new crop, consisting of Gravensteins, arrived during the first week in August. The fruit was a little short of color, but of excellent quality and condition. Some slight bitter pit was present in the larger sizes, but generally speaking there was less pit than usual. A large part of the Gravensteins sold in London are used by the Jewish trade. It is said that 95 per cent of the Gravensteins sold on the Exchange go East of the Thames, which is the large Jewish section of the city. As the season advanced, color was more pronounced which helped the sale. The Gravenstein deal, as a whole, can be described as being satisfactory. Few, if any, complaints were registered and no just criticism can be made of the pack or of the fruit.

The middle of September witnessed the first arrival of Washington Jonathans. They were somewhat lacking in color, being more or less dull and not especially attractive. The condition, however, was satisfactory and good prices were returned, best lots making from 12/6 to 13/- (\$3.04 to \$3.16)\* per box. Toward the end of September the demand was affected by a large percentage of the arrivals landing in poor condition. Unfortunately, many shipments had been carried under ordinary stowage and arrived over-ripe and wasty. The fruit had little vitality and needed quick selling. Confidence in the softer varieties was lost and prices took a rapid downward revision. A large volume of fruit during this period sold as low as 4/3 (\$1.03) per box. Best lots ruled at from 8/- to 10/- (\$1.95 to \$2.43) but, owing to poor condition of cargoes as a whole, price levels settled at from 2/- to 3/- (49 cents to 73 cents) less.

Several shipments of Jonathans shipped via New York, which had been carried overland in ventilated cars and overseas in ordinary stowage, arrived in very bad condition. In comparison, a few shipments brought over under ice landed in splendid condition, demonstrating the value of refrigerated shipments over ordinary stowage. While the market for good fruit ruled at from 10/- to 12/- (\$2.43 to \$2.92) per box, many were sold at from 5/- to 8/- (\$1.22 to \$1.95) depending upon condition. Condition, rather than supplies, influenced price during this particular period.

The California Newtown deal opened up with a definite improvement over former years. From the very beginning a marked improvement was noted in the pack and quality of the fruit. The fruit throughout has been gener-

\* Conversions made at par or \$4.86. After September 21 the average rate for each month has been used. Where the time is indefinite \$3.65 has been taken as the average for the season.



ally of good appearance, being bright, smooth and with less russeting than is frequently the case. The pack itself is worthy of special comment, since the general outturn showed such a marked improvement over many shipments of previous years. In a few instances certain marks arrived flat and somewhat slack, but the deal, on the whole, has been so much better than last season that criticism is unwarranted. Tight packs, well crowned, neatly wrapped and of good appearance are expected from the Watsonville district as well as from the Northwest.

Boxed apples during the early part of the season were in rather light supply with the exception of California Newtowns, which were in greater evidence than usual. About the first of January boxed Winesaps and Oregon Newtowns made their appearance and met with a fair inquiry. Supplies were on the light side, however, and the condition of the fruit was generally good.

During December the "Buy British" campaign had an adverse effect upon American fruit. While it is true that sales were slowed down for a certain period, the effects were not lasting.

A dull period in the fruit trade just preceding and following the Christmas holiday is another one of the many European traditions which shippers must take into consideration when forwarding supplies. Ordinarily, the week preceding the holiday week everyone is busy laying in stores in anticipation of the seasonal demand. The auctions and private treaty salesmen at this period are usually very busy serving the retailer, so that he, in turn, can serve his customers with their holiday needs. During Christmas week, while the retail trade is busy, the wholesale market is a dead spot, having served its usefulness the week before. This year, for some unexplainable reason, the expected did not materialize. During the week of December 14-19, stocks which were heavy failed to move and wholesalers were faced with prospects of a large carryover. Retailers were operating on a hand-to-mouth basis and, not knowing what the demand was likely to be, limited their purchases to normal, immediate requirements. During Christmas week, however, the unexpected happened. Money was not as short as was indicated and holiday purchasing assumed a nearly normal condition. Demand increased and retailers soon found themselves out of supplies. A last-minute rush was made on the market, which relieved the wholesaler and broker of his anticipated carryover.

Furthermore, the revival in trade following the holidays was resumed somewhat earlier than usual. Ordinarily a return to normal is not anticipated before the middle of January. However, owing to short supplies on hand, together with light supplies afloat, the market took an upward turn, resulting in the best prices realized for several weeks.

The box deal for the remainder of the season was more or less of a disappointment. Supplies, although not unusually heavy, were in excess of demand and frequently the bulk of auction offerings was withdrawn, or passed through failure to interest buyers in asking prices. Buyers throughout the season maintained a very cautious attitude. Speculation was reduced to a minimum and frequently a difference of 3 pence ( $4\frac{1}{2}$  cents) stood between seller and buyer in consummating a sale. Furthermore, the rapid and constant change in shippers' quotations established a condition which was unprecedented and with which buyers were unable to cope.



Instead of increasing sales, the widespread use of cabled offers had an opposite effect. It gave buyers the impression that apples were more plentiful than they really were, and that, by waiting, they would be able to obtain still lower quotations. Furthermore, small buyers, who in the ordinary way depend upon the auctions and direct importers, brought in a few cars which were split up between six or eight or perhaps more small dealers. In many instances direct offers were received by buyers who were not only financially unable to make purchases, but who were without knowledge as to how to proceed in opening up letters of credit and handling the deal from the other end. With restricted sales on the Continent, the boxed deal was made even more difficult and a great deal of criticism was voiced on the part of the regular trade because of methods employed by shippers in their endeavor to speed up or increase sales.

The situation on the Continent for the greater part of the season was difficult. Values were disappointing in Holland, Germany, Belgium and the Scandinavian countries. Purchasing power was low and, together with large supplies of locally-grown fruit, it was impossible to get levels up to the point where net results were profitable to the shipper. In France the position was much better - in fact, it offered the one bright spot in Europe at the beginning of the season. Owing to competition which developed between importers in a neighboring country, heavy supplies of low-grade fruit, which arrived in chartered boats in bad condition, were unloaded at French ports and broke the market. This condition had an adverse effect upon the entire price level and, for a certain period, good No. 1 Yorks were being offered for 85 francs (\$3.33) per barrel and less delivered in Paris. This situation made it difficult for boxed apples, which moved to low levels in sympathy with barrels. Damaging propaganda with respect to American apples, which appeared in French papers from time to time, also created a position which made it difficult for importers to maintain prices.

The season showed less variation in price trends with boxes than with barrels. One remarkable feature in regard to boxes was the small margin in price that has existed between Extra Fancy, Fancy and "C" Grades. There was a definite tendency on the part of the trade to reduce the usual premiums that have hitherto operated between prices of the three grades. Ordinarily in past years, a spread of at least a shilling (24 cents) could be figured between the different grades. This season the premium paid on Extra Fancy over Fancy was frequently not more than 6 pence (11 cents) per box. Buyers in many instances paid within 3 pence (5 cents) for Fancy in preference to Extra Fancy.

Generally speaking, it can be said that prices on boxed fruit throughout the season were unsatisfactory. With certain exceptions there was a general decline from the beginning of the season. Prices on the Continent did not pick up until toward the close of the season, when local supplies became exhausted and American apples were without competition. During April and May prices in both Holland and Germany took an upward turn, realizing levels which exceeded expectations.

Prices on the Rotterdam market were disappointing, which condition can be largely attributed to the absence of foreign buyers. Holland, being a small country, cannot begin to absorb the quantities of fruit discharged at Rotterdam. Rotterdam, like Antwerp, is regarded chiefly as a transit



market. Rotterdam sales are usually well attended by foreign buyers especially from Poland and Germany. This season, buyers from these countries were conspicuous by their absence. Owing to currency restrictions in Germany, German buyers could not operate. It was not until very late in the season that Dutch sales were attended by outside buyers. In view of these conditions, it is remarkable how many American apples were actually consumed within the boundaries of Holland.

Except for spasmodic and temporary variations, prices in Belgium were on an exceedingly low level throughout the season. This is partly due to the fact that reckless imports via Dunkirk and Le Havre played havoc with the port of Antwerp being used for transit sales, particularly in supplying markets in the North of France.

Comments on boxed varieties: It can be said that the Jonathan continues to grow in popularity on the European markets and commands a premium over other red varieties. The Jonathan deal this past season was more or less of a disappointment owing to the condition of the fruit upon arrival. Many shipments made during the early part of the year were carried without ice. The fruit arrived over-ripe, soft and, in many cases, wasty. Importers attributed this condition to a weakness in the fruit and it was frequently argued that it had no carrying quality and no resistance. During October the market on best fruit ruled between 10/- and 12/- (\$1.95 and \$2.33) per box, while many parcels which arrived over-ripe and wasty sold as low as 4/- to 6/- (\$.78 to \$1.17) per box. The Jonathan maintained its popularity on the Continent, but much criticism was heard from time to time about condition. If fair price levels are to be maintained for this variety, it seems imperative that it should be carried from loading point to final destination under refrigeration.

It has been interesting to watch the development of the Delicious. Although still not known to any great extent, it is gaining in favor. In Liverpool upon several occasions the variety was in greater request than any other apple, and sold at a good premium over other varieties. Supplies were generally light. During the early part of the season, prices compared favorably with those of Jonathan and varieties of comparable quality. Upon several occasions it sold at higher prices than any other variety on the market at the same time. "C" Grade Delicious often fetched more money than Extra Fancy Winesap. The condition of the fruit for the most part was good. Upon one occasion it sold for 16/- (\$2.91) per box on the Liverpool market, which was about a shilling higher than its next best competitor.

Spitzenburgs were as a rule in light supply. Some very good parcels were observed throughout the season, but, for some reason or other, the merits of this apple are not appreciated in Great Britain to the same extent as obtains on the Continent. In addition to supplies being light in Great Britain, they were irregular. It was a rare occurrence when offered in the same market two weeks in succession. Prices remained quite constant, fluctuating only with the movement of the market as a whole. In Germany, the Spitzenburg is better known and appreciated. Supplies are regular and prices rule on a fairly consistent level.

The Ortley is a much appreciated variety on most continental markets, Germany and Rotterdam being the most favored outlets. The fruit for the



most part arrived in good condition and realized good prices. France also took appreciable quantities, being purchased largely through the Dutch auctions. Prices were again on the average higher than those realized for other varieties, but averaged from 3 to 4 marks (\$.81 to \$.95) less than last season. There was also less disparity in price between Fancy and Extra Fancy. Owing to condition, prices during certain weeks showed considerable range. Only a few small lots of Ortleys were received in England, and were sold at disappointing values. Outside of Newtowns, there was little demand for green or yellow varieties, colored apples being in particular request during the greater part of the season.

Boxed Newtowns were in liberal supply throughout the season. The first shipment from California arrived the third week in September or about two weeks earlier than the preceding season. The condition of the fruit was good and, as the general outturn of the pack was so much superior to previous years, the trade was glad to handle them. Offerings were again much heavier in London than in Liverpool, but Liverpool showed substantial gains in the takings of this variety over the previous season. Although sales during certain periods were slow, supplies were worked off gradually, making it possible to maintain fairly even levels throughout the season. Owing to the short supply of Oregon Newtowns, it was possible to maintain a consistently high level for the California product during the first three or four months of the new year (1932). Toward the close of the season, supplies from Australasia began to arrive and values dropped from an average of 14/- to 15/- (\$2.55 to \$2.73) to around 12/- to 13/- (\$2.18 to \$2.37). Some excellent prices were made in Liverpool and Glasgow, values during certain weeks rising to 16/- (\$2.91) for best marks and most popular counts. Values in London were also considered satisfactory.

The Oregon Newtown, particularly that from Hood River, is the Yellow Newtown most in demand and commands a premium over fruit from other sources. The Medford Newtown is also liked, but fruit from this district does not always run true to varietal characteristics expected from that district. Occasionally buyers are under the impression that they are paying for Oregon Newtowns and receiving Yakima or California fruit. The typical Oregon Newtown, such as Hood River and certain sections of Medford produce, is the type most desired on the United Kingdom markets. Prices, on the whole, were higher than a year ago, but, because of the unfavorable rate of exchange, in addition to a 10 per cent tariff, the values when converted into terms of dollars represented a lower net return to the grower.

Throughout England there exists a definite preference for the green type over the yellow. On the Hamburg market the opposite preference prevails. English buyers prefer those which are on the green side, while in Hamburg the demand for Newtowns does not set in until after the fruit has begun to take on a yellowish cast.

The Winesap deal was again one of great disappointment. It was spoken of throughout the entire season as being "sticky". Although the fruit was of good appearance and arrived on the whole in satisfactory condition, the demand was very slow and prices ruled at low levels. Price was the determining factor in the movement of this variety. Buyers had a definite price in mind and would pay no more. The demand at all times was slow and frequently it was necessary to withdraw the bulk of the offerings,



sellers being unable to get the asked-for price. The f.o.b. price was very low and speculators considered values very fair. However, at times it was difficult to get cost out of the fruit and considerable money was lost. The average ruling price throughout the greater part of the season averaged between 8/- and 9/- (\$1.46 and \$1.64). Little distinction between grades was made, Fancies and "C" Grades selling for very little less than Extra Fancy.

The heavy supplies of Winesap tended to depress the boxed apple market, but the relatively low rates which prevailed were due more to the variety itself than to a market condition. The boxed Winesap is not well liked in Europe and buyers will take almost anything else in preference to it. Toward the end of the season, when supplies became short, values increased, but at no time did they reach levels comparable with a year ago.

### Barreled apples

The barreled apple deal, when all factors are taken into consideration, can be described as being satisfactory. Price levels exceeded early season expectations and, had the pound remained at par, the season, from a shipper's point of view, would have been altogether different. All through the season there was a moderate to good demand for best parcels, but prices were influenced to a large extent by the miserable condition in which many shipments landed. Although the Continental demand was considerably curtailed because of the large local crop, the demand which obtained throughout Great Britain went a long way toward offsetting the Continental slump.

Barreled apples throughout the season moved under a definite price trend. Despite supply, it was extremely difficult to move outside of a given range. When the retail ticket went above what the public considered a popular price, consumption decreased more than usual. Had the barreled apples arrived throughout the season in uniformly good condition, there would in all probability have been little fluctuation in price trends. The small margin that existed in price between boxed grades cannot be said to apply to barreled stock. A definite preference manifested itself all along for No. 1 fruit, and in lesser degrees Utilities, as compared with the Unclassified pack.

During August and the first half of September, quite a fair level of values was maintained, despite the unusually heavy quantities on offer. August shipments consisted mostly of Williams, Duchess and Transparents. Owing to the questionable condition of some marks, buyers, profiting by past experience, were a little wary about buying anything except the best parcels. Fruit showing good color was in request, high-colored Williams making as high as 26/6 (\$6.45) per barrel as against 14/- (\$3.41) for the same grade, but showing little or no color. That color is the greatest single quality factor in the marketing of fruit on the European market was certainly clearly demonstrated this past season.

The first shipment of barreled apples arrived on July 20, part of which went to Liverpool and the remainder to London. The shipment consisted of Yellow Transparents. The Liverpool shipment, because of the small size of the fruit, received little attention and was not cleared during the first sale, despite the small quantity on offer. The fruit was very green, had an immature appearance and was tasteless. The London shipment was likewise dis-



appointing. It consisted of two lots, shipped from different sections of Virginia. One lot shipped under refrigeration arrived in good condition, the other shipped ordinary stowage arrived hot, fruit split open, soft and wasty. (See illustration, page 43.) The refrigerated fruit sold for from 16/- to 20/- (\$3.89 to \$4.86) per barrel and those out of common stowage at 10/- (\$2.43).

Transparents made little headway in London, which again proves that London is a poor market for this variety. In fact, the demand is never so keen for early apples as it is in the North. The county of Kent, being at the back door of the world's largest metropolis, furnishes the London market with its early apple requirements and, when there is a good crop of these sorts in the orchards contiguous to London, the prospects for shipments originating from America are not particularly bright. Liverpool and Glasgow frequently offer splendid opportunities for limited quantities of early apples, which often realize very high prices. The same cannot be said for the markets to the South.

During the latter part of September and early October barreled apples began to arrive in bad condition. The fruit was very hot, sometimes cooked, and often showing heavy wastage. The general outturn was unreliable and buyers were afraid of it. (See illustration, page 43.) Refrigerated shipments which, comparatively speaking, were small, made good prices but the period under review revealed a sharp decline in values. Toward the end of October and until the middle of November there was some improvement in the condition of the fruit and price levels took an upward turn. Buyers were regaining confidence and it looked as though there would be a steady improvement.

Unfortunately, the Importation of Raw Apples Order, prohibiting the entry of low-grade fruit, terminated on November 15, and on the 17th, large quantities of the lower grades were offered to the public. The outturn of much of this fruit was bad, having the appearance of having been gathered up from the orchards late in the season, or having been held in warehouses and barns waiting for the lifting of the embargo. The life of the fruit was already well spent and much of it had to be sold quickly at distressingly low prices. The large quantities of Utility and Unclassified fruit were in great measure responsible for the downward trend in prices.

The unrestricted movement of low-grade fruit can have no other than a depressing effect upon any market and is a factor contributing to a lower price level for all grades and varieties. The serious break in prices in December can, no doubt, be attributed in part to the heavy receipts of low-grade fruit, together with the fact that the better grades arriving at the same time consisted of the clean-up from orchards and common storages; fruit which had ripened up or at all events lost its keeping quality. The recovery in prices after the holidays was ascribed to lighter supplies, and also to the fact that offerings consisted of cold storage stock which had considerably more life than much of the No. 1 fruit which arrived prior to the New Year.

European markets appear to be developing a distinct demand for the better grades and the best varieties. No. 1 fruit was not difficult to sell at any time throughout the season, while, at certain periods, the



lower grades met with a very dull demand and were difficult to sell. This point also holds good for Canadian shipments. Number one fruit from Nova Scotia maintained a surprisingly even price level and moved within very narrow limits. Domestics, on the other hand, were very difficult to move and showed a wide range in price.

The German markets took comparatively few barreled apples during the first half of the season. Supplies were on the short side, but total supplies, largely from local sources, kept the trade fully occupied. The economic situation did not warrant the shipment of inferior stock, but nevertheless the condition of certain arrivals was none too good.

A situation which developed in Antwerp between certain importers was no incentive toward establishing or maintaining satisfactory prices on the French market. Chartered ships were used by these importers to carry apples to France. The shipments were mostly discharged at Dunkirk, France and, for the most part, consisted of inferior fruit. It is said that the fruit was none too good when loaded at American ports. A sixteen to twenty-day sea voyage with poor ventilating did not aid in improving the condition. The fruit, according to all reports, carried a small guaranteed advance and, as the freight was comparatively cheap, it could be offered at prices which would allow the speculators to clear without a loss, but at levels unsatisfactory to those who purchased fruit under different conditions.

Price levels in France during certain periods were reduced to unnecessary levels due to the reckless imports discharged at the ports of Dunkirk and Le Havre. The French market was certainly good for 125 to 150 francs per barrel (\$4.90 to \$5.88), if not higher, whereas it was possible to purchase good No. 1 Yorks laid down in Paris for 85 francs (\$3.33) and less. French importers operating direct experienced great difficulty in meeting this competition.

During the autumn months slack barrels were again in evidence; certain shipments showing a large part of the cargo catalogues as slack. This meant a reduction of from 1/6 to 3/- or 4/ (27 to 55 or 73 cents) per barrel, irrespective of variety, grade, size or actual value of the fruit. It was a common occurrence to see barrels showing several inches slack. (See illustration, page 43.)

Throughout the period of the embargo Canadian shippers repeated their mistake of shipping heavy quantities. It was quite evident that an effort was made to clear as large a part of their holdings as possible before the restriction of lower grades from America terminated. Late-keeping winter varieties, which should have been held back for January, February and March shipment, were sent over before the holidays and marketed along with early winter sorts. Good values could have been made later, but then it was too late. Number one fruit from Canada maintained a very narrow price range because of the vast improvement in the Nova Scotian pack this season. The number one pack was uniform, one pack comparing favorably with another. The domestic grade moved in a wide price range, depending upon the actual merits of the fruit. The domestic pack, as a whole, was bad.

The protracted hot spell which prevailed throughout the Eastern States during the autumn and winter months certainly worked to the disadvantage of the grower and shipper. Shipments, loaded sizzling hot on the



steamers, showed little change in temperature when discharged. Consequently much of the fruit landed in poor condition. Upon several occasions temperature readings, taken of the fruit upon arrival, showed as high as 85° F. There was no apparent price trend during this period, each lot being sold strictly on its merits. The range was wide, running from 6/- to 26/- (\$1.09 to \$4.73) per barrel. Soft varieties, such as Grimes, Jonathan, Bonums, etc., were especially bad and, in some instances the fruit had to be condemned. Refrigerated shipments were making from 20/- to 26/- (\$3.65 to \$4.73) per barrel, depending on variety, as compared to 12/- to 16/- (\$2.18 to \$2.91) for common stowage fruit.

Comments on barreled varieties: York Imperials generally speaking were not up to their usual standard. Shipments, for the most part, were short on color with many parcels oversized and coarse. This condition seemed to vary according to district. The quality of Yorks from the middle and southern part of Virginia was disappointing. The quality of the fruit from the North Valley was much better and seemed to improve the farther north one went. Fruit from the Staunton-Waynesboro district was large (in fact, too large for best results on the English market), coarse and deficient in color.

The price range in Yorks can be attributed to this condition. There was a steady demand for best parcels, which sold at very satisfactory prices, all things considered. About the middle of October, there was a noticeable improvement in Yorks, both from color and finish as well as condition. In view of this improvement, the tone of the market immediately developed a more optimistic aspect. During November, however, parcels were again lacking in quality and the market declined. After November 15 large supplies of inferior Yorks found their way to most markets and contributed to the downward revision of prices. It should also be mentioned that the York Imperial lacked its usual keeping quality. Shipments which were held with the view of a possible improvement in the market broke down in storage and had to be moved quickly to prevent a greater loss.

Albemarle Pippins were in fairly plentiful supply during the late winter months and met with a steady demand. The quality generally was good and, although at times there was an over-supply of small sizes, they made satisfactory prices. The crop of Greenings was short, which aided the sale of Albemarles and, when such a condition exists, a good Utility Albemarle is usually assured of a satisfactory outlet at favorable prices. The comparatively low values obtaining in Virginia made it possible to place substantial quantities on the English markets, which were sold at a good level of prices. Importers hold the view that the popularity gained this season will be of value to growers in years to come. The price paid for Albemarles ruled steady and values moved in accordance with size and grade. The London market could have used a greater quantity of larger-sized fruit. At times only very small sizes were available.

While comparing the sales of boxed fruit with those of barreled fruit, it is of interest to note how, during certain periods, barrels continued to sell steadily at quite good prices, while boxes fell steadily over the same period. This was particularly noticeable in the case of the Winesap variety. While boxed Winesaps were meeting a slow sale at from 8/- to 9/- (\$1.46 to \$1.64) barreled Winesaps were in good request at from 23/- to 28/- (\$4.19



to \$5.10). The explanation of this is that buyers held the view that Wine-saps grown in the barreled districts are of superior flavor to those produced in the boxed states. The average ruling price for good No. 1 fruit held steady throughout the season at prices ranging from 25/- to 28/- (\$4.55 to \$5.10) per barrel.

Despite the fact that Grimes Golden during certain periods realized very low prices, the increasing popularity of this variety on English markets is quite noticeable. Grimes Golden arrived in very heavy quantity and frequently in very poor condition. Had quantities been less or better distributed and the fruit been of more satisfactory condition upon arrival, price trends would have shown an altogether different picture. In this connection, it should be mentioned that upon most markets there is a distinct preference for 2 $\frac{1}{2}$ " Grimes over the smaller sizes. Immediately one gets into 2" and 2 $\frac{1}{4}$ " fruit, there proves to be a considerable difference in value as compared to 2 $\frac{1}{2}$ ". The same applies to the larger sizes or those exceeding 2 $\frac{1}{2}$ ". Although there is a certain demand for the larger sizes in certain sections, the demand is pretty well limited and confined to the 2 $\frac{1}{2}$ " apple. The Bonum is also gaining popularity in England, especially in the southern part of the country.

In commenting on varieties, the increasing popularity of the Delicious is not without significance. Eastern-grown Delicious gave much satisfaction and the demand was usually good. Best parcels commanded particular attention and, as a rule, brought prices well over the average ruling market price. During certain periods Delicious were especially sought after on both the Liverpool and London markets.

Supplies of barreled apples from New York State were in greater evidence than for some years past. Shipments from the New England States were very light - in fact, at no time arrived in sufficient quantity to create an impression on the market. Greenings were in short supply, but some excellent parcels were observed from time to time which met with a strong inquiry and sold at good prices. Baldwins and Ben Davis predominated and generally speaking landed in good condition and were appreciated by the trade. Baldwin prices compared very favorably with other best varieties and frequently outsold Yorks by several shillings. The New York pack showed an improvement over former years. Supplies consisted almost entirely of two grades, U. S. No. 1 and Combination No. 1 and Utility. The condition of some shipments prior to Christmas, however, was very poor and fruit had to be moved at distressingly low figures. During January and February, conditions improved and the February receipts were especially nice. There was more paper used in the New York pack this season, thereby reducing the amount of scald which is usually present on late-season shipments.

Shipments of New England fruit were heavier to Hamburg than to Great Britain. Prices ruled low, owing to the poor keeping quality of the fruit and the amount of waste and decay. Those apples which are exported from New England are not especially pleasing to the trade. One frequently hears the remark that New England apples are not what they used to be. New England growers who wish to continue in the export deal would do well to follow the example set by Nova Scotian growers this past season with respect to improvement of pack.



Basket apples

A much larger percentage of apples was packed in baskets last year over previous seasons but there was no noticeable increase in the export movement. Although appreciable quantities were available during most of the season, the basket seems to be faced with certain obstacles as far as the British markets are concerned. The package is not popular with the trade, buyers preferring either the box or barrel. Prices, however, compared very favorably with those received for apples of similar variety, grade and size when packed in one of the other containers.

Several shipments were also made in the Trabox. The package, although new, was quite well received and prices compared favorably with fruit packed in the other recognized packages.

Consignment versus f.o.b. sales

Because of the large crop both at home and abroad, in addition to the general economic situation, importers tried to keep away from forward purchasing as much as possible. Many importers who, in the ordinary way, are inclined toward outright purchases, decided early in the season that there would be sufficient apples sent on consignment to satisfy their requirements. As a result, shipments during the past season were, for the most part, sent over on a straight consignment basis, or on a small guaranteed advance. In case of barreled apples, there seems to be a growing tendency on the part of importers to operate on an advance basis. Early in the season, local representatives advance money to growers for the financing of their crop. This seems to work out pretty well, but instances occur now and then when the importer fails to receive fruit on which he has advanced money.

Although the box deal in past years has been handled largely on strict f.o.b. terms, the past season showed a distinct shift to a consignment basis. This, however, does not necessarily mean that a general tendency is developing in that direction, but may be regarded more or less as a seasonal condition. In large crop years, particularly when European supplies are heavy, it is to be expected that a larger percentage of the crop will move on consignment than when a shortage in supplies exists. When there is a light crop in Europe and but a moderate crop in the States, importers feel that they must go to the source of supply in order to be assured of securing their requirements.

During the past season certain outright purchases were made early in the season, which cost the importer considerable money, owing to the unfavorable rate of exchange, which existed at the time the fruit was shipped. Also certain importers offered guaranteed advances in excess of what the market would bear, after converting shilling sales into terms of dollars. Importers, knowing pretty well crop conditions both at home and abroad, operated very cautiously and tried not to obligate themselves any more than necessary.

There was little need for operating on f.o.b. terms in boxed fruit inasmuch as the trade was flooded with offers quoting fruit on a very small advance. Furthermore, the market changed so rapidly that buyers were afraid



to accept any offers. Buyers holding fruit on the basis of \$1.00 per box were forced to sell in competition with others who were selling on the basis of 80 cents or less. There was absolutely no stability in quotations and, with the market dropping every day, buyers soon gained the impression that sellers had become panicky and, if they waited long enough, they would be able to get the fruit for nothing. Furthermore, the knowledge buyers had of the large crop in the States, together with the prices being quoted, had a very bad effect upon the market. Small buyers, who were in receipt of quotations, knew as much about prices and conditions as did the importers. Naturally it was impossible to hold up a market as no matter what price levels receivers attempted to maintain, buyers refused to bid and the market was forced down.

There is a certain interest among the trade in a direct business on f.o.b. terms in the barrel district, provided certain reliable marks can be obtained. Were the barreled industry better organized, it is quite possible that trading on f.o.b. terms could be considerably extended. However, until this takes place, it is to be anticipated that the deal will be handled largely on a consignment basis, or on a certain guaranteed advance, depending upon the season.

The producer of boxed apples has certain distinct advantages over the grower from the East. Because of the high degree of standardization which has been developed, a large part of the business in boxed fruit is sold sight unseen. It is largely a question of selling paper. Brokers operating in boxed fruit receive offers from firms selling a certain well-known brand. They get in touch with their customers and a sale is made. Sometimes a shipment may change hands two or three times before the goods arrive. This is possible owing to the confidence which has been built up over a period of years. It is not possible to operate in barreled apples in the same way. Only a few marks enjoy this privilege.

In shipping fruit to Europe, whether on consignment or on outright purchase, the requirements of each particular market must be carefully taken into consideration. When quoting size ranges, an endeavor should be made on the part of the shipper to give the purchaser a fair proportion of the sizes which are preferred in his market. Furthermore, in promoting f.o.b. sales, a fair, straight deal is a gilt-edged investment which will continue to return dividends. Scandinavian importers, for the most part, are not favorably inclined toward the f.o.b. system. They would much prefer to work on a consignment basis, because of the risks they have to assume in carrying fruit such long distances.

#### Market developments and restrictions in Europe

Fruit is beginning to be looked upon in most European countries as a necessity. The "Eat More Fruit" campaign put on in certain countries in recent years has gone far toward stimulating an appetite for fruit. Athletic clubs have increased in popularity and, in the development of sports, the consumption of fruits is considered a necessary part of the diet.

At no time has American fruit been more widely and favorably known throughout Europe than it is today. The standardization of the American pack has perhaps done more than anything else to develop and extend markets. The United States is generally recognized as a leader, both as regards uni-



form packing and as a producer of high-quality fruit. Competing countries frequently stencil their packages "American packing". During the past few years American shippers have succeeded in reaching the most out-of-the-way markets and the wide distribution can rightly be regarded as nothing short of phenomenal.

France provides the outstanding marketing development of the 1931-32 season. Prior to 1928 very few American apples found their way directly into France. Small shipments were brought in through Antwerp and Rotterdam. In 1931-32, Havre, Bordeaux, Dunkirk and Marseilles were important ports of entry for American apples. Direct lines established between America and France which offered regular and fast sailings. In addition to the regular liners, large shipments carried on chartered ships were discharged at Dunkirk. The ports of Le Havre and Dunkirk were used chiefly for supplying the markets of Paris and Northern France, while Bordeaux and Marseilles were used as distributing points for the South of France and the Mediterranean area. Marseilles was also used to a considerable extent as a transit port for Algiers and the North coast of Africa.

During 1930-31 American apples found their way into almost every city, town and village in France. A trip taken from the Belgian frontier to the Mediterranean disclosed empty apple boxes in evidence everywhere. Following the sale of the fruit, the containers did not lose their usefulness as they were used for delivery purposes and in making wagons for children. During the late spring and summer months, it was still possible to find American apples being served in the small villages and roadside eating places. Frequently large displays were to be found in shops located in the heart of an important producing section.

France produces sufficient quantities of low-quality fruit to take care of its requirements. There is no point in American shippers attempting to fill a gap which does not exist. The Frenchman wants the best, large apples we have to offer and is willing to pay the price. Anything which does not come up to No. 1 in quality is described as "rubbish".

The 1931 crop in France was of fair size, below average, but still far from a failure. In spite of this, the takings were greater than in any previous year. During certain periods, sales in France were difficult and prices ruled low. This, however, was mainly due to the offer of large quantities of inferior fruit.

There was less buying in Rotterdam by Polish buyers, but direct imports into Poland offset this factor. Poland is attempting to develop her own ports and is offering certain inducements to encourage direct shipments. In the season just closed Poland imported 79,000 boxes and 8,400 barrels direct as compared with 4,400 boxes and 300 barrels in 1930-31. Since business between Dutch importers and Polish and German buyers was curtailed, a greater effort was made on the part of Dutch importers to effect a wider distribution of American apples throughout their own country. Because of the low price, many more apples were consumed in this way than would have been possible otherwise.

The possibility of creating a wider distribution of apples throughout Germany, Austria, Czechoslovakia and the Danubian States is rather remote at this time, owing to the serious economic conditions and exchange re-



strictions which prevail throughout that territory. It seems to be the outstanding ambition of every country to increase its exports and decrease its imports.

Most European countries during the past year have been actively engaged in building political and economic fences. Exports and imports from the different countries have been seriously restricted. There have been innumerable orders, decrees, embargoes, quarantines and quotas. One country acts for protection, the other for retaliation. American apples were handicapped because of increased and abnormal customs duties, adverse rates of exchange, threatened and partial embargoes, restricted currencies and newspaper propaganda. They seemed, however, to meet a definite demand. There is every reason to believe that Europe will continue to draw upon America for supplies, but, if we read the signs aright, the time has arrived when it will pay to export only the best.

#### Comments on grading, packing and condition

Early-season shipments: The British trade, during the early part of the season, commented frequently upon how fortunate it was that the Apple Order was in force, restricting the movement to No. 1 or better fruit. Had the lower grades been permitted, the market would no doubt have suffered much more than it did due to the presence of immature fruit. It appears that growers are alike the world over, when it comes to getting shipments off too soon. While immature fruit from the States was being restricted because of grade requirements, varieties from Canada were being shipped out of season. Canadian winter apples such as Baldwins, Greenings, Starks and similar varieties, arrived ahead of their season at a time when markets were liberally supplied with the proper sorts and consequently had to be sold at a considerable discount. Had they been carried over until their proper time, results would have been much more remunerative to the shipper. Since the Importation of Raw Apples Order has been in force, many brokers have admitted the fallacy of encouraging too early shipments. The shipment of green, immature fruit does not make customers and the quicker this fact is recognized the better off the industry will be.

Low-grade fruit: In discussing this question with the trade, there was an almost unanimous opinion that it would be better for all concerned if shipments of low-grade fruit, particularly the Unclassified pack, were entirely eliminated from the field. Poor fruit always entails a certain amount of risk. Condition is frequently bad, but, even if it arrives sound, it is unsatisfactory to handle, both for the importer and the retailer. Furthermore, the returns to the shipper are usually unprofitable and cause dissatisfaction, so much so that it would be far better in many cases to dispose of them at low prices at home.

It was not uncommon during the past season to see barrels sold for less than the cost of transportation, to say nothing of handling charges, cost of package, harvesting costs, etc. During years in which supplies are very short, which does not happen frequently, there may be a tendency to overlook some of the points which are so severely criticized in years of plenty. Taking the deal year in and year out, it is not difficult to prove that, by selling low-quality fruit in competition with the better grades, the general price level is brought down. It is not a few barrels of the worst fruit or a



few barrels of the best which make a market. It is the general outturn or the average condition of the supplies as a whole. Certain shippers, who have the best marks, will undoubtedly receive a premium over and above the average ruling market price. They must not, however, overlook the fact that the large proportion of inferior fruit has established a lower price level than would otherwise be the case. Therefore, although they are in a position to boast of higher net returns to their neighbor, they themselves, as well as their fellow shippers, are the losers.

In a season such as the past one, when everyone knew there was an overabundance of fruit, it is difficult to understand why anyone should risk the high charges involved in transporting fruit of low quality to far-away markets. Although the shipment of Unclassified fruit was lighter than usual, it should have been eliminated altogether. The severe break following November 15 can be directly attributed to the deluge of inferior stock which was being held back pending the termination of the embargo.

Cold storage: The true function of cold storage and the part it plays in the marketing of fruit was never better illustrated than during the period under review. A more general use of low temperatures during September and October would have prevented a large part of the heavy losses which were incurred because of over-heated fruit. It is to be regretted that a large number of shippers could not have been present to see their fruit upon arrival and to see for themselves the comparison between refrigerated and ordinary stowage fruit. (See illustrations, page 43.) If shippers could be made to realize the importance of carrying soft varieties such as Grimes Golden, Jonathans, Bonums, and King Davids during the fall months under refrigeration, many disappointments in returns could be avoided.

Yorks ordinarily carry well during the early part of the season in common stowage. In fact, most importers prefer to have them arrive that way since it has a tendency to bring out the ground color of the fruit and render it more saleable. During the latter part of the season, it is advisable to carry Yorks and most other varieties under refrigeration. This past season Albemarle Pippins were carried successfully in ordinary stowage until late in the season. The success of this venture, however, is largely attributed to the fact that the fruit was well protected with shredded oiled paper, thus reducing scald to a minimum.

Continental receivers complained bitterly during certain periods about fruit landing in such poor condition. Much of their trouble was caused by fruit discharged from ships not engaged in the regular handling of fruit and which took two weeks or more to make the crossing. Furthermore, some of the fruit may have been loaded warm and was over-ripe at the time of shipment.

In the English auction catalogue, it is customary to list the fruit separately according to whether it was carried under refrigeration or in ordinary stowage. Without exception, fruit listed as being refrigerated brought several shillings over that described as ordinary. During the month of September, the difference between the selling price of refrigerated fruit and ordinary stowage was quite pronounced. For instance, on the 24th, U. S. No. 1 Jonathans, refrigerated, ruled at from 28/6 to 30/6 (\$5.54 to \$5.93) per barrel, as against 21/6 to 25/6 (\$4.18 to \$4.96) for ordinary stowage. Owing to an over-heated condition, a large volume of fruit was sold for from



10/- to 14/- (\$1.95 to \$2.72) per barrel, i.e., common stowage fruit testing from 75-83°F. upon being removed from the ship. New York Wealthys at the same time were making from 23/- to 25/- (\$4.47 to \$4.86) per barrel for refrigerated as against 15/- to 18/- (\$2.92 to \$3.50) for ordinary stowage. On the first of October, refrigerated Bonums, on the London market, sold at 22/- to 24/- (\$4.37 to \$4.76) as against 18/- to 20/- (\$3.57 to \$3.97) for common stowage. Boxed Jonathans, during the same period, were selling for from 4/3 - 7/6 (\$.84 to \$1.49) per box ex-ordinary stowage, as against the market price of from 9/- to 12/- (\$1.79 to \$2.38) for good firm stock shipped under refrigeration. In the months of September and October, the demand for apples was without question largely governed by the condition of the fruit upon arrival.

It is the opinion of the largest importers that refrigeration is absolutely essential with certain varieties of apples and equally essential for other varieties at certain periods of the season. Apples that have been held in cold storage for some considerable time in America, and consist of varieties that are likely to develop scald, should by all means be shipped under refrigeration.

The question of refrigeration cost is a matter to be considered at all times. Certain varieties of fruit can stand this cost, whereas others cannot. Upon one or two instances during October last, Grimes Golden were taken off ships badly over-heated and cooked, having been carried ordinary stowage, while at the same time Ben Davis were being discharged from the same ship ex-refrigerated chambers. An important Glasgow firm, in discussing this question, stated that, if they had their way, all shipments coming from America to them would be refrigerated, especially Jonathans.

Slack barrels: In spite of all that has been said and written on this important subject, slack barrels continue to arrive in increasing quantity. From July 22 until August 31, 5,939 barrels were handled through the Liverpool auction. Out of this total only 468 barrels were sold as tights, while the remaining 4,471 barrels were catalogued and sold as slacks. Up to the middle of August, only 3 barrels out of a total of 4,400 landed tight. During the months of September and October, from a total of 100,917 barrels sold through the auction, 46,680 barrels were sold as slacks, while 54,237 barrels were listed as tight.

The accompanying table shows the number of barrels sold through the auction month by month, together with the number of tights and slacks. As supplies handled through the auction brokers constitute between 50 per cent and 60 per cent of the total receipts, these figures form a reliable index as to the condition of all arrivals. Figures furnished regularly throughout the season by private treaty brokers show about the same percentages. Since these figures represent about one-half of the total Liverpool receipts and since the minimum deduction charge of 2/- (36 cents) was used, it can be conservatively said that the estimated loss to shippers on this one item alone amounts to approximately £30,000 (\$109,500). It must be recognized that this represents but one European market and that a similar situation prevailed in other markets. See table following page.

Month	Slack	Tight	Total	Slack percent- age	Estimated loss
	Barrels	Barrels	Barrels	Per cent	Pound sterling
July.....	1,548:	0:	1,548:	100.0	154
August.....	3,923:	468:	4,391:	89.3	392
September.....	27,677:	18,187:	45,864:	60.3	2,767
October.....	19,003:	36,050:	55,053:	34.5	1,900
November.....	20,651:	97,085:	117,736:	17.5	2,065
December.....	28,589:	35,597:	64,186:	44.5	2,858
January.....	5,698:	24,023:	29,721:	19.2	569
February.....	9,160:	91,854:	101,014:	9.1	916
March.....	9,418:	62,329:	71,747:	13.1	941
April.....	5,366:	17,913:	23,279:	23.0	536
Total.....	131,033:	383,506:	514,539:	25.5	14,098

No distinction has been made between what the trade terms "tickers" and "shakes". By a "ticker" is meant that a barrel is only slightly slack. The word "shakes" is used to describe barrels which may run from an inch to several inches slack. During September, October and a part of November, it was not uncommon to see barrels landing from two to five and six inches slack. Much of this slackness was due to waste, but frequently sound parcels are observed which will be two and three inches slack.

The average depreciation on a slack barrel is about 2/- (36 cents). This amount is automatically discounted from the value over a tight barrel. Barrels classed as shakes are discounted very heavily, perhaps as much as 6/- to 8/- (\$1.09 to \$1.46) depending upon the degree of slackness. The condition of the market has a certain effect upon the amount of discount. If supplies are short and the demand is active, only 1/- or 1/6 (18 or 27 cents) may be knocked off the market value. Ordinarily, however, it is reasonable to expect a loss of about 2/- (36 cents) per barrel. The Liverpool market is much more particular about slacks than many other markets. This is because a large percentage of the fruit purchased in Liverpool has to be reshipped to other markets in the North of England, Scotland and Ireland. Because of the extra handling involved buyers expect an additional depreciation in value upon arrival at final destination.

Certain growers have learned the knack of packing their apples so that the barrels land consistently tight. On the other hand, it is very seldom that other marks land in any other condition than slack. This question is one which cannot be over-emphasized. Growers must learn to pay closer attention to their packing operations. If certain growers can pack their fruit so as to arrive tight, it goes to prove that it can be done. Orchard-packed fruit cannot be expected to land tight and growers packing under these conditions will continue to receive account sales netting less than the ruling market price. No doubt, the arrival of slack packages is in some instances unavoidable, and it is inevitable that a cer-



tain percentage is bound to arrive in that condition due to the numerous handlings the packages receive between the packing house and the quays on the other side of the Atlantic.

It has been frequently suggested that shipments are subjected to excessively rough handling on the American side. European receivers pay particular attention to the way in which fruit is discharged and most steamship companies employ the most modern and up-to-date methods in transferring packages from the holds to the quays. In addition most brokers have their own man on the docks who looks after the unloading of his firm's goods. Careful handling on the part of growers and receivers is of little value if it is to be neutralized by rolling and throwing the fruit about at port of export.

Certain shipments carried on chartered boats landed with an unusually high percentage of slacks. It would seem that the method of stowing has a great deal to do with this as many of the barrels were stowed on their ends. Stowing barrels on their ends is a new experience to the trade and one which did not gain any favor. Importers certainly are opposed to stowage in any manner other than on the bilge.

Slack boxes: The box pack, on the whole, showed great improvement over the previous season. As previously mentioned, the improvement in the Watsonville pack is worthy of special commendation. Gravensteins from the Sebastopol district were generally good and no complaints were registered during the season. Boxes occasionally observed from the Pacific Northwest were a trifle slack, but, in the main, they were tight, and well put up. Many slack boxes were in evidence which originated in the Eastern States - boxes from Maryland, especially, being definitely slack packed. Also a few shipments from Virginia were flat and slightly loose.

Northwestern apples have established a splendid reputation for excellency of pack. No section or country of the world has yet been able to approach it. The trade clearly recognizes the supremacy of this pack over all others and growers should make every effort to see that this reputation be fully maintained.

Packing apples for export: It has been frequently pointed out that a tight pack is essential for export. This does not mean that a package should carry an excess bulge, or a barrel be filled so tight as to result in crushing the fruit. A tight pack, which prevents any possible movement of the fruit, in addition to full weight, is what the trade particularly desires. Owing to the method of retailing fruit in Europe, which is on a weight basis, buyers are continually weighing one mark against another. They soon learn to distinguish the heavier weights and buy them in preference to other marks. Care must be exercised in packing the box to avoid a crown which will bruise the fruit under pressure of the lid. Boxes should be wired or strapped, preferably strapped. Also cleats should be used on both tops and bottoms. Occasionally this season boxes were seen with cleats on but one side. For further points on packing, reference is made to F.S. A-376.

The bushel basket: The box and barrel continue to be the most popular export packages but the basket is gradually gaining in favor. Dur-

ing 1930-31 there obtained throughout the United Kingdom a definite prejudice against this type of package. In some markets it received a very cold reception, while in others receivers were skeptical but still tolerant. As pointed out last year, the future of the basket as a package would depend largely upon the type of basket used. This statement has been largely borne out since apples packed in the stouter baskets have been received during the past season with distinctly more favor. Although many receivers still prefer handling their shipments in either barrels or boxes, they are not so prejudiced against the basket. There is no doubt but that inquiry for baskets has been stronger and sales better than existed the previous season.

Certain importers, who have handled large quantities of baskets during the past season and have given the matter particular study, are of the opinion that only the dessert varieties should be packed in baskets. Wine-saps and Albemarle have done especially well in baskets and other varieties such as Stayman, Grimes Golden, Jonathan and similar varieties have also been well received when packed in this container. Yorks, Black Twigs, Ganos and Bons should continue to be packed in barrels. In Scotland the basket has not made much headway, the trade showing a distinct preference for the barrel. On the Continent, the basket is quite well received. France especially absorbed considerable quantities.

As one importer ably expressed it, the future of the basket depends entirely upon the basket. By this is meant type. The straight-sided, raised-bottom tub, constructed of heavy material stands a good chance of succeeding. On the other hand, if shippers insist on exporting a package constructed chiefly for domestic use, its possibilities are extremely limited as a successful commercial export package.

Scalded apples: Scald plays a very important part in the selling of apples. Price after the first of January is controlled to a great extent by the presence of this disease. Nothing will scale down prices more readily than scald. The losses incurred each year from this condition are difficult to estimate. Scald this past season began to develop in certain varieties as early as the middle of December and increased in intensity as the season advanced. During the latter part of January, arrivals packed without paper, or with insufficient quantity, were sold at a heavy discount and caused buyers to lose confidence in barreled fruit. Buying was done along very cautious lines and a wide range of prices existed between scalded and non-scalded fruit.

The York Imperial seemed to be especially susceptible and poorly-colored fruit was badly bronzed. Furthermore, scald seemed to develop very rapidly. A shipment would be discharged in what appeared to be good condition and, in a few days, it would be difficult to recognize it as the same parcel. Judging by what happened this past season, it is quite apparent that many growers do not realize the gravity of this situation. No further argument is necessary on the receiving and to convince buyers of the value of fruit which has been properly protected through the use of shredded oiled paper.

The question of scald and its effect upon values is alarming. If a barrel of apples free from scald is worth say 30/- (\$5.46) it will only realize 22/- to 24/- (\$4.00 to \$4.37) if it is slightly scalded. If it is



badly scalded, the price will usually depreciate to around 15/- or 16/- (\$2.73 or \$2.91). It is not claimed that shredded oiled paper will give 100 per cent control, but is a proven fact that scald is effectively reduced if the proper amount of paper is used and it is evenly distributed throughout the barrel.

Certain growers apparently use paper for decorative purposes only. This is a serious mistake. Buyers are not so readily deceived, since barreled fruit is not purchased sight unseen, or by confining inspection to the face of the barrel. There is no economy in skimping on paper. For practical results a full pound and one-half should be used. Buyers used to complain about buying paper in place of apples. Today the opposite cry is heard. Upon several occasions paper was removed from barrels to determine its actual weight. Frequently not more than one-half pound was used and, upon one occasion, the total weight of paper used by a certain grower in one shipment was slightly under two ounces per barrel.

In addition to the control value of oiled paper, the use of properly colored paper adds to the attractiveness of the pack. Purple seems to be the popular choice. The use of green paper should be made with extreme care. It should never be used on red varieties, particularly when the fruit is somewhat short on color. The green paper accentuates the green in the fruit and makes barrels appear even shorter of color than they usually are. Purple or a good shade of red seem to subdue the greens and accentuate the red, which, of course, is what is most desired. If green paper is used in connection with packing green varieties, it will pay the grower to study the shade of green which is most desirable. For all purposes, however, the purple paper will perhaps give the best results. Scald is not much of a problem in connection with boxed fruit, due to the use of oiled wraps.

Size range in barrels: There is little to add to this question, except perhaps to repeat what has been said on many previous occasions. A definite size range exists in the several important markets and a study of preferences obtained in each market must be made if best results are to be obtained. The matter of sizing is becoming better, but there is still sufficient room for improvement. Packing fruit  $2\frac{1}{4}$ " or  $2\frac{1}{2}$ " up, or  $2\frac{1}{4}$ " minimum, is not a good practice for the European trade. Controversies are continually arising between importer and buyer on this point. Buyers argue that, when a barrel, for instance, is marked  $2\frac{1}{4}$ " minimum, they expect all the fruit to be near the size indicated. It requires a lot of explaining to convince buyers that the term is used to designate minimum size only. Much misunderstanding could be avoided if a size range was used in place of a minimum size. The range should be kept to within one-half inch limits. Some packers use a quarter-inch range.

There is a distinct preference on the London market for small sizes, although, in certain varieties, buyers are beginning to show preference for slightly larger sizes. Generally speaking, London buyers prefer sizes ranging around  $2\frac{1}{4}$ " -  $2\frac{1}{2}$ ". A uniform pack of from  $2\frac{1}{8}$ " -  $2\frac{1}{2}$ " is what they really want. In the North - Liverpool, Glasgow and the Midlands - the preference is for a slightly larger size,  $2\frac{1}{2}$ " -  $2\frac{3}{4}$ ". The Scandinavian countries prefer a size range from  $2\frac{1}{4}$ " -  $2\frac{3}{4}$ ", while Germany, Holland and France lean toward the larger sizes. France is especially particular about size and



can use larger sizes than any other market in Europe. It is disastrous to send very small apples to France as they are heavily discounted. In shipping to various markets, it should be remembered that, while certain sizes will sell for a premium in one market, they will be heavily discounted in another. The question of size, of course, also applies to boxes, but this has been pretty well worked out between shipper and importer. Large size boxed apples are seldom seen on the London market.

Spray residue: One seldom hears any reference made to this subject. Because of the vigilance exercised on the part of shippers and steamship companies, a situation which at the time looked very grave has been successfully handled. The Export Form Certificate has really worked miracles in meeting a difficult situation. Because one hears little in connection with residue, it does not mean that Government officials are becoming less vigilant in their inspections. Last autumn two cars of Jonathans originating from Washington State were held up at Southampton by public health authorities because of excessive spray residue. Samples were analyzed and found to be in excess of the tolerance limit. Some boxes examined were clean, other boxes, however, were heavily coated with a deposit of spray material, which looked like lime. The shipment was refused entry. Visible residue does not necessarily mean that the fruit is unfit for consumption. Nevertheless, spray residue, regardless of its chemical make-up is highly objectionable. Had this fruit slipped by the Southampton inspector and found its way into retail shops, it may have led to the arrest of the shopkeeper, followed by much undesirable publicity.

The spray residue removal problem has brought about a remarkable improvement in the appearance of fruit. The attractiveness and sales value has been enhanced. Washing has meant much to the grower of boxed apples and it would prove equally effective to the barreled industry. Barreled apples must compete with boxed fruit; therefore, the same care must be exercised in making a favorable impression on the trade. Washing injury was noticeable in some boxed shipments. The value of coating apples with paraffin is still a much mooted question. The European trade generally is not favorably inclined toward fruit so treated.

#### Standardizing grades, and classification of apples under grades:

The necessity for standardization of fruit moving in export trade has never been so great as at the present nor has the trade ever been so well informed on the question of standard grades as they are at present. The American fruit industry has the distinction of being the recognized leader in the standardization and classification of fruits. The high standards adopted and the excellence of pack developed in the United States, have made it possible to establish a world-wide market for American fruit. They have enabled producers to ship fruit several thousand miles, at a high cost, to compete with locally-grown supplies produced at a low cost.

Foreign governments have taken, and are taking, an active interest in attempting to raise the standards in their own countries. In England the National Mark has been developed, which requires growers selling under that mark to pack according to definite standards. In Holland, Germany, Switzerland, Italy and other European countries a definite program has been developed encouraging growers to produce better fruit and to standardize the



packing. Shippers in Australia, Tasmania, New Zealand, South Africa, Palestine, Chile, Argentina, Russia and many other countries are following the example set by American producers. Progress in some countries has been rapid, in others slow but altogether competition met by American fruit is steadily increasing.

Frequently an opportunity is not appreciated until it has passed. Most American producers, no doubt, realize and appreciate the value of creating and maintaining foreign outlets. The necessity, therefore, of not only maintaining but improving our standards has never been more important than it is now. The future of the European markets certainly will depend to a large extent on how well our standards are maintained.

Various measures, which have been imposed upon us from time to time by certain foreign governments, have in the main worked out to our advantage. The problem at first seemed unsurmountable, but a satisfactory solution was soon discovered which put us ahead of the game. The Importation of Raw Apples Order, for example, is working toward the ultimate benefit of the industry. English importers, at first were very much opposed to the restriction of our lower grades during the embargo period, but are now enthusiastic over it. This is after two seasons' experience with the operation of the law. The value of standardized grades has been fully demonstrated during the period in which only the higher grades were allowed to enter. Although the condition of the fruit during that period was disappointing, the grade of the fruit itself was good. It is generally believed that, had all grades of fruit been allowed to enter, including the Unclassified pack, the situation would have been much worse and prices would have dropped to ruinous levels.

It is the standard practice of the boxed apple states to separate their apples into grades according to color and defects. The Extra Fancy grade requires that apples be well colored for the variety and have few blemishes. The Fancy grade allows more blemishes and less color is required for the variety. Practically every packing house packs both of these grades. On the other hand in the barrel and basket region where the U. S. grades are used extensively it is not a common practice for the growers to sort as closely for color although the provisions of the U. S. grades give them the opportunity to follow the same practice as is common in the boxed apple region. The requirements for the U. S. Fancy and U. S. No. 1 grades which are the two top grades provided in the U. S. system of grading are the same except that apples to be of U. S. Fancy grade must have more color for the variety. However, growers have not followed the practice of sorting out the U. S. Fancy apples and packing them separately. Instead they usually pack all apples meeting the U. S. Fancy requirements in with those meeting U. S. No. 1 requirements and label the package U. S. No. 1. As a result of this practice on the part of growers much dissatisfaction often occurs in regard to the U. S. No. 1 pack, for the buyer does not know whether or not the U. S. No. 1 apples he purchases will be high or low in color. This depends, of course, upon the amount of U. S. Fancy apples which are run into the package as compared with those meeting the minimum requirement of U. S. No. 1. This same confusion and unsatisfactory marketing condition would be found in boxed apples if the western grower did not sort out and pack Extra Fancy and Fancy apples in separate boxes. A solution for this unsatisfactory marketing situation as far as the buyer is concerned would be for all Eastern growers to make it a practice to sort out and pack their U. S. Fancy and No. 1



apples in separate containers rather than to run them together in the same package and brand them as U. S. No. 1.

The Unclassified pack, as far as the European market is concerned, has meant nothing to the trade except disaster. Buyers are no longer willing to speculate with an uncertainty. Some Unclassified packs are definitely good, as good, perhaps, as many No. 1's. Others are no more than the name indicates. This past season Unclassified fruit was more in evidence than the season before. Owing to conditions both at home and abroad, the reverse should have been true. There is no profit in packing Unclassified apples in a year such as 1931.

The outturn of Utility grade as a whole was inferior and during certain periods was responsible for pulling down prices on better stock. A poorly colored Utility shows off all the defects and is really no better than the average Unclassified pack. A highly colored Utility is in demand. By raising the color requirement of the Utility grade, the pack could be made to fill a certain need. It is doubtful if the general demand and prices realized for Utility grade are commensurate with what the growers expected as compared to the better grades. The combination grades have shown up to better advantage, particularly those shipped from New York State.

There are no particular comments to make in connection with boxed apples. For such a large deal, it is remarkable how the high standards are uniformly maintained and how consistently the fruit runs to its proper classification. Owing to its uniformity and dependability, trading is carried on largely through cable. Frequently shipments are sold without sample and it is not uncommon to see lots offered and sold through the auctions previous to the arrival of the ship. Owing to economic conditions and lower purchasing power, the same distinction or preference between grades was not manifested. The demand centered largely around the Fancy grade and sellers found it difficult to interest buyers in paying a shilling preference for the Extra Fancy.

#### The transportation of fruit from America to Europe

One of the most important factors in the export trade is that of transportation. The possibility of extending and maintaining foreign outlets depends upon the ability of ships to land cargoes on a foreign market in merchantable condition. The success of carrying perishable commodities long distances rests not alone with the steamship companies. Carriers are frequently blamed and sued for things for which they are not responsible and which are entirely beyond their control. The problem is of such magnitude and the contributing factors so numerous that only through a sympathetic understanding between all interested agencies can the difficulties be satisfactorily overcome.

Claims amounting to thousands of dollars each year are filed against steamship companies and underwriters. Disputes between receivers and carriers are everyday occurrences. The carrier blames the shipper, while the receiver blames the carrier. Certain commodities now exported from America and others which could be exported are hanging in the balance. Comparatively few complaints are registered late in the season in connection with the carrying of apples and citrus fruits. In fact, even with fresh pears, most



of the trouble arises in connection with the movement from the Pacific Coast during August and September, and chiefly from California rather than from ports farther north.

The difficulties arising in connection with the early pear movement are almost beyond comprehension. Frequently, cargoes are discharged in deplorable condition, hardly a package being worth salvaging. Bartletts and Hardys in particular have given a lot of trouble and many importers have given up the hope of landing these varieties in a condition which will insure a profit. The fruit may be ever so well grown and may have been produced in the finest district in the world, but, if the article fails to arrive on the market in merchantable condition, the purpose for which the fruit has been produced is defeated. Importers generally look upon the Bartlett as being the most treacherous fruit they can handle. Many claim that a satisfactory business can never be developed in American Bartletts. Those who have made the attempt drop out, while new and less experienced importers step in.

That Bartlett pears and other highly perishable products can be successfully carried long distances has been fully demonstrated. If countries such as South Africa can deliver consistently on overseas markets an outstanding product, the same results can be accomplished by American shippers. In addition to pears, South Africa, for example, has developed an enviable record for discharging soft fruits, such as plums, peaches, apricots and grapes, in a most excellent condition on European markets. (See illustrations, pages 44<sup>and 55</sup>) Therefore, if it is possible for another country to accomplish such splendid results, there is every reason to believe that there is a great and profitable future for the American export trade, if the business is handled in the proper way.

One important difficulty confronting the European trade in connection with the handling of certain commodities from America is the general lack of confidence of both importers and retail distributors regarding the endurance of the fruit after landing at the port of delivery.

Assuming that the export trade of certain commodities may be small in comparison with the domestic, it is nevertheless a fact that the domestic trade would permanently suffer if adverse influences were to shut off the export outlets. Exports may represent but a small percentage of total production, but it frequently happens that this small figure makes it possible to maintain profitable domestic price levels. Every grower, no matter whether he exports or not, is able to secure better prices than would have been possible otherwise.

It is generally recognized that, if overseas markets are to be developed, it is essential that a reputation be established which is worthy of the state or country of origin. We in America have long since achieved certain standards with respect to grading and packing which are accepted as being of the highest character. These standards, it should be remembered, obtain for export as well as for domestic distribution. High standards, however, are not sufficient. In addition to being uniformly sized, graded for defects and properly packed, the fruit must be in good condition and have sufficient endurance to permit its going into normal consumption.



With regard to endurance of certain varieties of apples and pears, particularly those shipped early in the season, there is still too much speculation involved. The belief is commonly held among importers that Pacific shipments based on export conditions for pears are not much more advanced than that of the Australian export trade, both lagging far behind the standard achieved by the South African exporters, who are almost entirely dependent upon the export market.

It is not intended to imply that the South African shippers have overcome all difficulties, or that their fruit is possessed of everlasting endurance. It is an established fact, however, that, under the control of the South African Government, a feeling of confidence has been established in the United Kingdom amongst importers and distributors of South African fruits.

The South African deal is under complete Government control, supervised by competent officials from the time the fruit leaves the trees until the returns are made to the grower. The Government has acquired the requisite power from the community to impose upon all exporters alike a more comprehensive system of inspection at all ports of loading than has yet been evolved by any other exporting country. The inspections at South African ports do not only take into account packing and grading, but pay particular attention to the condition of the fruit, to determine its ability to withstand the long ocean voyage and the limit of its marketing season at the end of same. There obtains, also under Governmental control, an elaborate system of pre-cooling plants at the loading berths of the ships, which, in effect, perform the same functions for the South African fruit exporting trade as the shipside abbatoirs perform at the South American ports for the chilled and frozen meat trade.

Because of the limited export trade in certain American fruits, particularly pears, plums and early apples, it is probably unreasonable to expect that sufficient capital could be provided to construct suitable shipside pre-cooling plants at the loading ports. It should also be borne in mind in connection with South African shipments that, although the standard for condition at the time of shipment has attained a very high level, it is still possible for a few shipments to get through the pre-cooling plants and into the ships in a somewhat too advanced state of ripeness. However, such occasional consignments are made the subject of special remark on the export certificate, issued at the port of export, and, when such consignments turn out at the port of destination in somewhat too ripe condition, the record at the loading end relieves the carrier of any responsibility, assuming, of course, that nothing irregular or unsatisfactory occurred during the voyage.

All shipments loaded at South African ports must be, and are, cooled down to about 36° F. in the port pre-cooling plant before they pass through the covered alleyways into the chambers of the ship. By this system it is obvious that the man who delivers fruit at the ship with fruit temperatures ranging from 50° - 75° F. and often in a semi-ripe state, has little chance in competition with his overseas competitor. Importers who are interested in seeing the trade for certain American fruits developed have repeatedly suggested that shippers should follow a system along lines developed by the South African exporters.



Even without the existence of scientific pre-cooling plants at the ports, it should be possible for inspectors, competently trained in fruit biology as well as in temperature control, to determine, by very thorough examination from samples, the endurance qualities of the fruit as it passes from the car or dock to the ship.

There are undoubtedly many shippers of the more highly perishable commodities, who are striving, and frequently under great difficulty, to deliver their fruit to the ocean vessels in suitable condition for the voyage and subsequent marketing. It seems apparent, however, that their efforts are to a large extent being defeated or rendered fruitless, because of the inefficiency and carelessness of other shippers, and by the consequent prejudice to the good name of these fruits on foreign markets.

The steamship lines are in a mood to discuss the entire matter with shippers and, if possible, to bring about a better understanding of the problem as a whole. Because of the enormity of the proposition and because all interests are equally affected, it is hoped that an arrangement can be perfected whereby the export trade in certain of our fruits can be materially extended.

#### The use of chartered ships in transporting American apples

Although chartered ships have been used by certain Canadian shippers for the past several seasons, their use had never been adopted by American shippers until this past season. For some time many shippers and exporters have been complaining about the heavy ocean rates charged for carrying apples from American to European ports. Repeated attempts have been made from time to time to have the schedules reduced, but without much success. Three seasons ago a large operator in Canada attempted to secure a reduction and, having failed, turned his attention to certain Scandinavian shipping lines through whom negotiations were made to charter small ships for the purpose of carrying apples from Nova Scotia to England. At first the venture was frowned upon and many importers discouraged the idea owing to the lack of, or limited, refrigeration space available, and the length of time required on the voyage. After several trials, however, importers became impressed with the condition of the cargoes upon arrival. In the past season, owing to low prices, the unfavorable rate of exchange and the endeavor to effect economies wherever possible, a certain group of importers made arrangements to have apples carried from American ports to their market in a similar manner. The trade from the start took definite sides on the question. The group which condemned the idea was skeptical about the condition of the fruit upon arrival and was fearful of retaliatory measures which might be applied by the Conference Lines. The group which fostered the idea was determined to give it a trial and to ascertain whether the 25 to 30 cents reduction per barrel was worth while.

Having observed the shipments of both groups throughout the season and compared the outturn of one against the other, it is apparent that there are advantages and disadvantages in each. The chief advantage of a chartered ship is the saving in freights, and their use as a bargaining weapon in forcing rates down or bringing about lower rates. There are several disadvantages among which may be mentioned: 1. No refrigerated space - necessitating ordinary stowage at all seasons; 2. The possibility of overloading markets;

3. Irregularity of sailings; 4. Length of time required in making crossing; 5. Poor ventilation, accentuating development of scald and breakdown.

The difference in freight offers a temptation which many importers cannot pass by. This, together with a small guaranteed advance, encourages certain operators to speculate, with the result that markets are frequently overloaded and prices suffer in accordance.

The French, Belgian and Dutch markets suffered frequently throughout the season because of an over-supply of low-quality fruit which arrived in poor condition. Belgian importers, who brought over large quantities by chartered boats, have been especially guilty in this respect. This fruit had to be cleared immediately on an already well supplied market, at disastrous prices. The chartered ships operating between American and United Kingdom ports were perhaps more fortunate than some of those carrying cargoes to the Continent, but in any case the length of time required in bringing fruit over in one of the small chartered ships is entirely too long. Furthermore, certain steamers landed defective cargoes, but it is the opinion that the damage had been done prior to shipment, since a part of the cargo was in excellent condition. It is also true that, while chartered vessels were landing certain shipments in defective condition, conference ships were doing likewise. In the event that the policy of using chartered ships is continued, it is essential that the ships used are carefully chosen, that they are well ventilated and that careful supervision is given to the loading and stowage. One of the outstanding features in connection with chartered steamers is to keep the quantities of fruit delivered by such ships within the capacity of the markets to which they are consigned.

A comparative price analysis was made between the outturn of chartered ships versus the regular lines. In some cases prices compare favorably. In others, chartered ships brought slightly higher prices than the conference lines; while, in other cases, the reverse was true. Certainly, on the whole, the conference cargoes did not outsell the chartered boats by a sufficient margin to cover the difference in freight. The entire question is still a controversial one and requires additional study before definite conclusions can be drawn. See table on following page.



Comparison of prices received for fruit carried via chartered  
ships with the Liverpool ruling market price

Date		Price for fruit via chartered ship	Ruling market price
		Shillings	Shillings
<u>November 5</u>			
Yorks No. 1	2 $\frac{1}{4}$ "	21/6 - 23/-	20/6 - 22/6
	2 $\frac{1}{2}$ "	21/- - 23/-	21/- - 21/6
Winesap	2 $\frac{1}{4}$ "	25/- - 26/-	25/- - 28/-
	2 $\frac{1}{2}$ "	26/-	25/- - 26/-
Ben Davis	2 $\frac{1}{4}$ "	21/-	19/6 - 21/-
Stayman	2 $\frac{1}{2}$ "	23/- - 23/6	20/6 - 22/6
<u>November 11</u>			
Yorks	2 $\frac{1}{4}$ "	20/6 - 22/6	20/6 - 22/6
	2 $\frac{1}{2}$ "	20/- - 22/-	20/- - 22/-
Stayman	2 $\frac{1}{4}$ "	21/- - 23/-	20/- - 21/-
	2 $\frac{1}{2}$ "	20/- - 22/-	20/- - 21/-
Winesap.	2 $\frac{1}{4}$ "	24/- - 25/6	23/6 - 25/6
	2 $\frac{1}{2}$ "	24/- - 27/-	25/- - 27/-
Blk. Twig	2 $\frac{1}{4}$ "	20/6 - 21/6	21/- - 21/6
	2 $\frac{1}{2}$ "	21/-	21/- - 22/-
<u>November 18</u>			
Yorks No. 1	2 $\frac{1}{4}$ "	18/- - 20/-	18/- - 20/-
	2 $\frac{1}{2}$ "	18/6 - 19/6	18/- - 19/6
Stayman "	2 $\frac{1}{4}$ "	18/- - 20/-	18/- - 20/-
	2 $\frac{1}{2}$ "	18/6 - 20/-	18/- - 20/-
Winesap "	2 $\frac{1}{4}$ "	23/- - 23/6	23/- - 24/-
	2 $\frac{1}{2}$ "	24/-	23/- - 24/-
<u>November 26</u>			
Yorks No. 1	2 $\frac{1}{4}$ "	17/- - 19/-	16/- - 18/-
	2 $\frac{1}{2}$ "	17/6 - 19/6	16/6 - 18/6
Winesap "	2 $\frac{1}{4}$ "	22/-	22/- - 24/-
Stayman "	2 $\frac{1}{4}$ "	16/6	15/6 - 17/-
Blk. Twig "	2 $\frac{1}{4}$ "	16/3 - 17/-	17/-
	2 $\frac{1}{2}$ "	17/6	17/- - 17/6
<u>December 2</u>			
Yorks No. 1	2 $\frac{1}{4}$ "	17/- - 19/-	17/- - 19/-
	2 $\frac{1}{2}$ "	18/- - 20/-	18/- - 20/-
Winesap "	2 $\frac{1}{4}$ "	21/6	22/- - 23/-
Stayman "	2 $\frac{1}{2}$ "	20/-	20/-
Ben Davis "	2 $\frac{1}{4}$ "	18/- - 19/-	18/-
	2 $\frac{1}{2}$ "	18/-	-
<u>December 9</u>			
Yorks No. 1	2 $\frac{1}{4}$ "	17/- - 19/-	17/- - 19/-
	2 $\frac{1}{2}$ "	17/3 - 22/-	17/3 - 20/-
Stayman	2 $\frac{1}{4}$ "	17/3	17/3
<u>December 16</u>			
Yorks No. 1	2 $\frac{1}{4}$ "	12/9 - 14/3	17/- - 19/-
	2 $\frac{1}{2}$ "	15/9	-
Winesap "	2 $\frac{1}{4}$ "	21/6	15/9
	2 $\frac{1}{2}$ "	22/-	23/- - 25/-
Alb. Pip. "	2 $\frac{1}{4}$ "	25/6	25/- - 26/-
Stayman "	2 $\frac{1}{4}$ "	16/- - 18/-	15/- - 17/-

Comments on fruit competition in European markets

That competition is becoming keener on the European markets each season is evidenced by the increasing supplies originating from countries hitherto regarded as unimportant in the international fruit trade. The London market continues to be the most cosmopolitan of all markets. The daily supplies, which are marshalled together from all parts of the world, present a truly remarkable sight. The British slogan that "the sun never sets on the Empire" is certainly manifested by the great variety of fruits that can be had on the London market at all seasons of the year. When the ground is covered with frost and the snow begins to fly in the British Isles and Canada, spring is bursting forth in South Africa and Australia. While Canada is busily engaged in shipping fall-harvested apples, South Africa is sending the first crops of the season, such as early peaches, plums, apricots and nectarines.

Growers and shippers who have not visited the European markets or who have never taken the trouble to study competition are in no position to appreciate what effect total fruit supplies have upon the demand for individual commodities. The possible demand for Northwest apples in Europe is not based upon the size of the boxed crop but upon all apples. The demand is also affected by the total supplies of fruit of all kinds and originating from all sources. It is true that boxed apples are distinguished from barreled apples, but, when entering a given port or market, they are regarded as so many hundredweight of apples.

It seems that all countries today, regardless of their location on the globe, regard Europe as the most fertile field for market expansion. Certainly the colonies and dominions of the Empire look toward the British Isles as the best customer for their products, South Africa, Palestine and Australia are almost entirely dependent upon Europe, while Canada certainly regards England as the logical outlet for the distribution of her surplus. Along with increased production and the development of new fruit districts in other countries, shippers are constantly seeking new outlets and a large share of their attention is focused upon Europe.

Competition among various countries is becoming keener each year. Furthermore, there is a gradual but noticeable trend toward improvement of packing, grading and transportation. In addition, one cannot overlook the effort which is being made in the European countries themselves to produce sufficient quantities to take care of local requirements. While the development may be slow, it is in certain instances inevitable and, if consumption fails to keep pace with production, the possibilities for increasing markets for American fruits may become lessened. One must take into account in this connection the question of protective tariffs and embargoes intended to stimulate home production. Competition is not confined to the apple, - in fact, the apple today must compete with a tremendous range of other fresh fruits which are in plentiful supply at the same time. In case apples are in short supply and the prices high, the consumer can turn to a cheaper line. During the summer months the European markets are generously supplied with berries, cherries, plums, peaches, oranges and early apples. Throughout the autumn and early winter months, there are generous quantities of pears, grapes, plums, apples, oranges, etc. Throughout most of the winter



and early spring months one finds an even wider selection, consisting of apples, pears, plums, peaches, apricots, nectarines, oranges, grapefruit, grapes, melons, bananas and many tropical and sub-tropical fruits. In fact, there is scarcely a fruit produced which at some time or another cannot be found on the London market.

In an article written by a German horticulturist the following statement appears: "While Germany has been considering Holland and America as the chief competitors in the fruit and vegetable industry, Italy has been steadily preparing to dominate the European market, particularly that of Germany, and will achieve its object if we continue to under-estimate the danger and do not devise some effectual means of defense". Italy has been pursuing constantly a definite policy looking toward the development of foreign markets. She has completely reorganized her production to suit the requirements of the export markets through the growing of better quality varieties and has attempted to rationalize the industry so as to reduce production costs. That these policies are being zealously followed was indicated by the heavy arrivals of Italian soft fruits in Great Britain throughout the 1931 shipping season. Upon the occasion of a visit to some of the producing districts in Europe in 1931, some of the finest orchards and packing plants to be found anywhere in Europe were seen in Italy.

The Tyrol is already famed for its apples and pears and the more southerly districts, particularly around Bologna, in Ravenna, will in the near future no doubt gain a similar reputation. Certain Italian fruits have reached a high standard of perfection, both as regards grade and pack, because of a high standardization program which has been developed in that country. The difficulty of exporting to Germany in 1931 made competition of Italian fruits on the English markets heavier than will ordinarily be the case. It is to be expected, however, that increased competition may be reasonably anticipated from this quarter.

While the Australian-New Zealand and American seasons have a tendency to overlap, the situation was less pronounced than in 1930. There was no effort made to prolong the marketing season beyond its normal period. Heavier shipments were made during the earlier part of the season and, although Australasian apples were available at the time of the first arrivals received from America, they were not present in sufficient quantities to depress prices.

The Australia-Tasmania-New Zealand crop this year (1932) was handled in a more orderly fashion. Supplies have been well controlled. Sailings have been regular and sufficiently far apart to permit clearance before the next boat arrived. Prices have been steady and have moved within a comparatively limited range. The quality and condition of the fruit have shown little variation, stock for the most part being of good merchantable quality. If future shipments are handled in the same way, the Australasian deal should continue to be a satisfactory one, but, if sailings in any season are not properly scheduled, supplies will become excessive and a general reduction in price will result. Large quantities of Australian Jonathan were available this season and, while the Jonathan is a very popular apple in England, it cannot be said that it compares in quality with an American Jonathan. It lacks color and finish and is very tough and rubbery. First arrivals had a certain amount of bitter pit, which decreased as the season advanced.

Russian apples constituted no threat during the season. Fairly substantial quantities were available on certain continental markets, but, because of inferior quality, were for the most part sold at considerably lower prices than American apples. At no time did they offer any competition in the English markets. The limited supply on offer in London met with a very slow sale.

The Russian pack depreciated materially during the past season. In fact, it has never been as good as the pack put up in 1929. In England a definite prejudice prevails against Russian apples and, although they are better received on the Continent, they are not sought after or considered popular with the trade. During the period of the "Buy British" campaign it was almost impossible to interest the trade in Russian apples. The policy of setting a price limit, which was adopted in 1930, by the Russian Government, was discontinued. Distribution was taken over by agents rather than being controlled by the Russian legation.

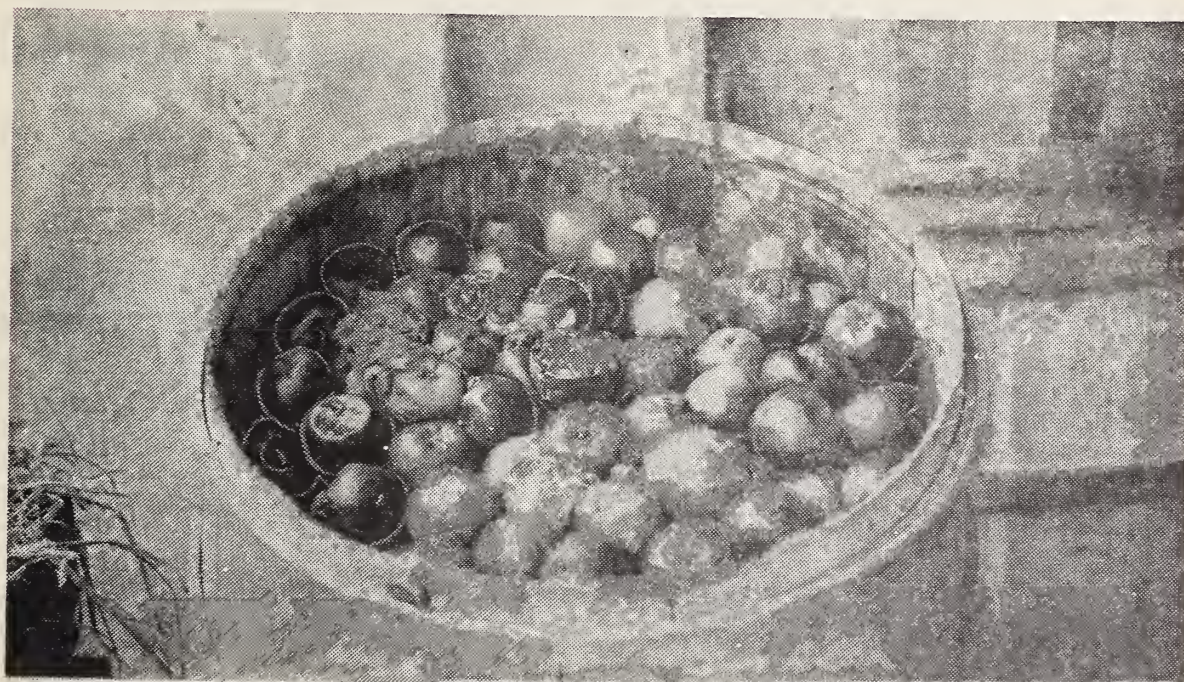
Chilean apples were shipped in greater quantity than ever before. Owing to a late season pick-up on the Continent, supplies originally intended for Great Britain were diverted to continental ports. Chilean apples have many good points, but there still remains much to be done in the way of harvesting, grading and packing. Apples for the most part were harvested while still immature. Sizing was irregular and boxes loosely packed. Chilean fruit is of good flavor and has a pronounced aroma. The Delicious seems to be the most promising variety. A few shipments of nectarines arrived in good condition, but, like the apples, were harvested slightly immature. (See illustration, page 53.) The Chilean Government and Fruit Growers' Association have in mind a definite export policy and in common with many other countries have their own representative in England. Although their apples do not begin to arrive until toward the close of the American season, they do offer a certain amount of competition to Winesaps and Newtowns.

As predicted last year, the abnormal shortage of apples which occurred in Europe during the 1930-31 season was not repeated. Furthermore, it is not likely to be repeated again soon. An export policy should be based upon a season such as the past one, rather than the one previous. The average European is undoubtedly paying more attention to the inclusion of fruit in his diet than he has ever done before. The consumption of fruit is increasing. There is a definite place in Europe for a certain quantity of American apples. The future of the export market rests largely with the grower. The overseas market will never be developed on the shipment of low-quality fruit. Since competition is becoming keener, it is the job of every grower to exercise every possible care in seeing that his shipments fill the need of definite market requirements. If competition is the life of trade, then we can anticipate plenty of action during the years to come. Since Europe today is in a position to pick and choose, the export trade will no doubt be settled on the basis of the survival of the fittest.





CONDITION OF YELLOW TRANSPARENT UPON ARRIVAL  
IN LONDON IN COMMON STOWAGE, JULY 20, 1931



A BARREL OF VIRGINIA WINESAPS SHIPPED UNDER  
ORDINARY STOWAGE. THIS BARREL REPRESENTS THE  
OUTTURN OF THE ENTIRE SHIPMENT





HARDYS - BADLY SHRIVELLED - A CONDITION  
FREQUENTLY OBSERVED UPON ARRIVAL IN EUROPE



PEARS FREQUENTLY ARRIVE IN THE CONDITION ILLUSTRATED.  
THESE PEARS WERE REMOVED FROM THE SAME BOX AND REPRESENT THE OUTTURN OF THE WHOLE SHIPMENT



SOUTH AFRICAN BARTLETT PEARS



The San Jose Scale situation

The past season has been one of difficulties, but one outstanding feature of the year has been occasioned through the presence of San Jose Scale. Barreled shipments were particularly guilty in this respect and a shipment to arrive not showing the presence of this insect was the exception, rather than the rule.

For several years Germany has had restrictions against San Jose Scale. Shipments are examined at the Free Port before being allowed to enter the country. Despite the fact that exporters are aware of the restrictions, from 5 to 7 per cent of the barreled shipments have been rejected. Following its discovery in France, government authorities immediately instituted an embargo against all American fruits. The embargo was later modified. Examination of our fruit, before being allowed to enter, was rigid and it was only after the most careful scrutiny that shipments were allowed to pass. The action taken by the government strikes many as being rather severe. Be that as it may, the fact is that certain requirements have been laid down which must be met. In order to obtain entry into France from now on, it is necessary for each shipment to be accompanied by a Federal sanitary certificate. A State certificate, irrespective of how good it may be, will not be acceptable. If shippers expect to get by, on taking a chance, they will be disappointed. The French Government ruled that on and after May 4, no shipments would be entered unless accompanied by the regular Federal certificate. This certificate is to be issued by the port offices of the Plant Quarantine Bureau of the United States Department of Agriculture. In addition to the certificate certifying the shipment to be free from scale, all goods, with the exception of oranges, lemons and grapefruit, will be subject to an inspection at one of the French ports before a release can be issued.

The law not only appears drastic, but is drastic. Growers must use every possible precaution in the future to see that shipments intended for France are entirely free from scale. No tolerance is permitted. The difficulty is further accentuated by the fact that a large business in American apples and pears is done between French buyers and importers from neighboring countries. An active trade exists between France and the ports of Antwerp, Rotterdam, London and Southampton. If this business is to be continued, it means that shipments consigned to the ports mentioned must be covered by the proper certificate, otherwise the goods cannot be transshipped to France. Following the publishing of the decree in March, several shipments were made from England and Holland, which were returned. Also shipments which would have arrived at a French port after May 4 without the proper documents had to be re-shipped to another market.

PEARS

The market situation: The 1931-32 pear export season opened with large pear crops in prospect both in the United States and in the chief European exporting countries, namely, Switzerland, Belgium, Italy, Austria, and Holland. The German crop was heavy and that of France average. Fortunately, however, the pear crop in the United Kingdom, the chief foreign market, was small. Despite the heavier competing supplies of pears available for disposal in the chief consuming markets, larger than average quantities of American pears were exported.

Total exports in the 1931-32 season were 1,814,000 bushels which is above the average for the past five years but smaller than the heavy movement of last season. About 8 per cent of the pear crop was exported this year against 10½ per cent in 1930-31. Of the 1,814,000 bushels exported 949,000 bushels went to the United Kingdom, 336,000 bushels to Canada, 200,000 bushels to France, 92,000 bushels to the Netherlands and 247,000 bushels to all other countries, chiefly Germany, Sweden, Brazil, Argentina, Cuba and Mexico. The outstanding development of the season was the large takings by France. In addition to France pear exports to the United Kingdom, the Netherlands and Sweden were above average, but those to Canada, Germany, Brazil, Cuba, Argentina and Mexico were below the average of the past five years. (See table, page 47.)

American pears meet European requirements with regard to flavor, quality, grade and pack but they often fail to satisfy as to condition. When European receivers can depend upon shipments arriving in sound condition, then there is a good possibility of further extending these markets for American pears.

PEARS: United States production and exports, 1922-23 to 1932-33

	Total United States				
Marketing year			Per cent	Boxed	Barreled
July-June	Crop	Exports.	of crop	crop	crop
			exported		
	1,000	1,000	Per	1,000	1,000
	<u>bushels</u>	<u>bushels</u>	<u>cent</u>	<u>bushels</u>	<u>bushels</u>
1922-23.....	20,705:	736:	3.6	10,127:	10,578
1923-24.....	17,845:	1,005:	5.6	10,440:	7,405
1924-25.....	18,866:	829:	4.4	9,240:	9,626
1925-26.....	20,720:	1,424:	6.9	11,993:	8,727
1926-27.....	25,249:	1,477:	5.8	14,720:	10,529
Average.....	20,677:	1,094:	5.3	11,304:	9,373
1927-28.....	18,373:	1,021:	5.6	11,750:	6,623
1928-29.....	24,212:	1,657:	6.8	16,147:	8,065
1929-30.....	21,172:	1,241:	5.9	14,801:	6,371
1930-31.....	25,540:	2,693:	10.5	19,356:	6,184
1931-32.....	23,009:	1,814:	7.9	15,124:	7,885
Average.....	22,461:	1,635:	7.5	15,436:	7,026
1932-33.....	22,149:	:	:	17,074:	5,075
	:	:	:	:	:

Compiled by the Foreign Agricultural Service from official sources. Bushels of 50 pounds.



UNITED STATES: Exports of pears by countries of destination,  
marketing years, July-June, 1926-27 to 1931-32 and the  
five-year average, 1926-27 to 1930-31

Country	Average					
	1926-27	1927-28	1928-29	1929-30	1930-31	1926-27 to 1931-32
	:1,000	:1,000	:1,000	:1,000	:1,000	:1,000
	:bushels	:bushels	:bushels	:bushels	:bushels	:bushels
United Kingdom.....	702.8	379.9	698.0	444.5	1,379.6	721.0
Netherlands.....	21.6	10.5	21.8	17.7	196.2	53.6
Germany.....	1.0	2.7	12.5	24.3	132.4	34.6
France.....	b/	0	2.1	b/	34.6	7.3
Belgium.....	0	0	b/	.5	22.6	4.6
Sweden.....	1.9	3.5	25.9	23.4	63.5	23.6
Denmark.....	0	1.6	0	1.6	9.4	2.5
Norway.....	.1	b/	.5	2.2	2.0	1.0
Other Europe.....	.1	0	2.0	1.7	6.3	2.0
Total Europe.....	727.5	398.2	762.8	515.9	1,846.6	850.2
Canada.....	555.1	442.4	648.7	465.4	602.0	542.7
Brazil.....	81.6	69.4	110.7	110.7	95.1	93.5
Argentina.....	43.4	37.4	55.0	78.1	66.8	56.1
Cuba.....	41.9	40.9	35.6	26.4	24.3	33.8
Mexico.....	10.7	13.8	18.0	17.6	16.1	15.2
Others.....	17.3	19.0	26.1	26.4	42.5	26.4
Total.....	1,477.5	1,021.1	1,656.9	1,240.5	2,693.4	1,617.9

Compiled by the Foreign Agricultural Service from official records of the Bureau of Foreign and Domestic Commerce. Converted from pounds to bushels of 50 pounds.  
a/ Preliminary. b/ Less than 500 bushels.

UNITED STATES: Total exports of pears by months, July, 1926 to May, 1932,  
and five-year average shipments by months for the period 1926-27 to 1930-31

Month	Average					
	1926-27	1927-28	1928-29	1929-30	1930-31	1926-27 to 1931-32
	:1,000	:1,000	:1,000	:1,000	:1,000	:1,000
	:bushels	:bushels	:bushels	:bushels	:bushels	:bushels
July.....	125.2	49.3	125.5	39.3	125.2	92.9
August.....	275.7	222.9	326.1	232.0	435.2	298.4
September.....	270.7	284.8	246.6	257.3	426.1	297.1
October.....	268.4	214.6	404.9	354.2	449.2	338.3
November.....	318.6	116.1	165.4	166.2	486.2	250.5
December.....	82.9	70.0	120.8	83.3	397.8	150.9
January.....	82.1	39.5	134.4	57.9	152.5	93.3
February.....	29.5	11.7	68.3	15.2	110.1	46.9
March.....	12.7	7.0	40.7	16.2	59.4	27.2
April.....	5.2	2.2	18.9	8.3	12.3	9.4
May.....	6.0	1.5	2.2	5.1	13.3	5.6
June.....	.5	1.5	3.1	1.7	26.1	6.6
Total.....	1,477.5	1,021.1	1,656.9	1,236.7	2,693.4	1,617.1

Compiled by the Foreign Agricultural Service from official records of the Bureau of Foreign and Domestic Commerce. Converted to bushels of 50 pounds.

a/ Not available.



The opening of the pear deal was disappointing. The first few shipments arrived at a time when the markets were generally depressed. Other fruits were in generous supply and sold at disastrous prices. The first shipment of California Bartletts arrived at Glasgow on July 1. They were shipped via New York and landed in good condition. This shipment was followed by larger consignments to London and Southampton with the market opening up at from 23/- to 25/- (\$5.60 to \$6.08). In a few days values lowered and kept depreciating until they struck a level ranging from 13/- to 17/- (\$3.16 to \$4.14).

The first direct shipment via Panama arrived on the 10th of August and landed in deplorable condition. There was not a sound box in the entire shipment of 8,000. This was unfortunate since many importers of previous experience were preaching that Bartletts from California could not be successfully exported. The collapse of the fruit was the result of a breakdown in the refrigerating machinery. The second direct shipment of Bartletts to arrive discharged its cargo in perfect condition, the fruit being exactly at the proper stage of maturity. Subsequent shipments were variable as to condition. Certain marks arrived perfect, others on the turn, while others were wet and showed a high percentage of waste. The majority of receivers are skeptical over the possibilities of ever establishing a satisfactory business in California early pears. That the fruit can be successfully carried has been demonstrated by individual shipments. As a deal, however, there is still much to be done before it can be called a success. For a period of several weeks careful observation was made of practically every ship carrying pears. The condition was so irregular, however, that it is little wonder that importers regard early importing a hazardous proposition. Frequently shipping companies acknowledge having accepted shipments which were testing as high as 73°F. at the time they were placed on board. Ships' logs also show that from 7 to 10 days were required, after the ship had left port, to get the fruit cooled down to a point where ripening was arrested. Under such conditions there is little wonder that receivers regard the Bartlett deal as highly treacherous.

Hardys arrived in somewhat better condition, on the whole, but occasionally some very bad parcels were observed. (See illustration, page 44.) Anjous and Comice were for the most part in beautiful condition and were much appreciated by the trade. Winter Nelis also came through well and, although at times they were difficult to move at satisfactory prices, on the whole the Nelis movement can be considered a success. Anjous, Comice and Nelis did well on the Continent, especially in Holland and France during the latter part of the season.

Comments on varieties: If the Bartlett can be landed regularly in good condition, it has a promising future. It must, however, arrive hard and green and have sufficient endurance to permit a reasonable marketing period. If they cannot be handled properly at point of origin, then it would be best to ship via New York and have them sold there on the basis of export condition. If they are sufficiently cool, leave New York in good condition, and are placed in the proper chambers in the ship, they should arrive in most European ports in good condition.

Hardys, with a few exceptions, had quite a successful season. Some shipments, like Bartletts, were bad. The Hardy, if not properly matured, has a tendency to shrivel badly. (See illustration, page 44.) It has a



better reputation than the Bartlett from a marketing standpoint, as it has more endurance.

The Comice is a most popular variety on all European markets. It is well known and commands the highest price of any variety. The California Comice is especially in request as it more nearly meets the requirements of the market.

Anjous were received in considerable quantities during the season and rank next to Comice in popularity and price. The demand for Anjou is increasing on the Continent, especially in Holland and France. The heavy offerings of pears during December caused prices to decline, but Anjous were only in fair supply and met with good inquiry.

The Winter Nelis is regarded as one of our best pears for export. Liberal quantities were received during the season. Some weeks, supply exceeded demand at asking prices and holders had difficulty in maintaining the price. Some weakness was apparent at different times, but, as a whole, the condition of the fruit was good and, from an export standpoint, can be regarded as satisfactory.

Kieffer pears, both in barrels and boxes, were received over a long period. Colorado boxed Kieffers were very attractive, being bright, smooth and in excellent condition. They have made a very good impression on the English markets. Kieffers from Virginia and New York were packed in barrels and bushel baskets. New York shipments were particularly heavy. A greater percentage was shipped under refrigeration hence they arrived for the most part in good condition. There was also quite a good movement of New York Bartletts in barrels, which, although of small size, and not particularly well graded, arrived in good condition and met with a moderate inquiry.

During the late winter and early spring months, the market was well supplied with pears originating from several sources. South Africa, South America and Australia made substantial shipments. The South African pear is well packed, but does not compare with American fruit as regards appearance or eating quality. (See illustration, page 44.) Australian pears are packed mostly in three-fourths bushel boxes. The fruit is quite well graded and possesses good flavor.

### PLUMS

The first shipment of California plums arrived in Glasgow on June 9. The following week a large shipment was received in Southampton and London. For the next few weeks, additional heavy shipments were received, which came on top of the heavy supplies of strawberries and shipments of stone fruits from France, Italy and Spain.

Early shipments consisted of the Beauty variety, which failed to make much of an impression on the British trade. There is a certain demand for Beauties, but it is decidedly limited. The London market can handle three or four cars of this variety, but when ten or twelve cars are landed in one week, it is more than the market can stand. Because of heavy competition, some Beauties were placed in cold storage. Market conditions did not improve and the fruit had to be sold. At the time they were withdrawn, many had be-



gun to show heavy waste. Results were naturally disastrous. It is the opinion of the trade that the demand for Beauty plums is definitely limited. Shippers should be cautioned about over-supplying these markets. Up to the end of July, 160,000 packages of plums were received in the United Kingdom as against 36,000 in the same period the previous season.

Prices for American plums were, on the whole, disappointing. Demand was slow and sales difficult to effect. The condition of most shipments upon arrival was good. Wicksons, Kelseys, Duartes and Presidents were all good. Oregons and Idahos were also received in good condition, but, because of the heavy competition from the Continent, it was impossible to hold prices up to profitable levels.

Idaho prune shipments were again in competition with those from Canada. However, this competition is not serious since the Canadian product does not compare with the American as regards packing, grading or condition. Small sizes are difficult to move on the English market, 4 X 4's and 4 X 5's being the most popular sizes. Anything smaller than 6 X 6 is hard to sell, except in years when English supplies are short.

It has been demonstrated that American plums can be successfully exported to Europe as well as those from South Africa. (See illustration, page 53.) Whether it will pay to ship them in the future to the United Kingdom during June, July and early August remains to be seen. Because of the unfavorable rate of exchange, together with the abnormal import duty of 14/- per cwt., up to August 15 it is quite possible that exports will be greatly curtailed, if not entirely eliminated. After August 15 the duty is 10 per cent ad valorem. Since Northwest prunes do not arrive until after this date the duty should not seriously affect the movement of that fruit.

#### PEACHES

The import of peaches into Great Britain perhaps exceeded all previous records. The market was abundantly supplied over a long period. Peaches of Italian origin were received in generous quantities and, because the English people are not accustomed to eating peaches, supplies piled up and prices were extremely low. Several varieties familiar to American peach growers were available. Beautiful trays of Georgia Belle, Elberta and Hale were on offer at prices less than the cost of transportation. While the cost of bringing a tray of peaches from Italy to London amounts to 1/9 (42 cents) per package, they were being offered on the wholesale market for as low as 1/6 (36 cents) each. The English markets were unprepared to handle such large quantities for the reason that the consumer still regards the peach as a luxury and is not accustomed to eating or preserving them to the extent that we are. During the winter months South Africa provides a regular supply, which almost without exception arrive in perfect condition. (See illustration, page 53.)

Spasmodic shipments of peaches were received from America. A few small lots came from California, while additional supplies came from Georgia, the Carolinas and Virginia. Early Rose was the first to arrive, which did fairly well considering the quality of the fruit. The condition of the fruit was good, but the demand was extremely limited. A small supply of Georgia Belles arrived at a time when the market was liberally supplied with offerings from Italy. The fruit was good, somewhat small in size, but well colored



and in good condition. These were also comparatively free of bruises. A shipment of Virginia Elbertas was observed in Liverpool. The fruit was packed in bushel baskets and landed in deplorable condition.

American peaches are practically unknown. If they are to succeed, they must be properly introduced. They must be carefully handled to ensure sound delivery. Shipments should be made in six-basket carriers rather than the bushel basket. Foreign peaches and nectarines are landed in European markets in excellent condition. Two illustrations of foreign packs are shown on page 53. In England a white-fleshed peach is preferred to one having yellow flesh. If the export trade in peaches is to be developed and made profitable, it is necessary to furnish a steady supply. Regular shipments, extended over a period of several weeks, may create a demand for American peaches. A satisfactory business will never be developed along the lines now being employed.

### GRAPES

The export movement in grapes was very much reduced over the previous year. Grape exports from the United States during 1931-32 amounted to about 13,800 short tons, compared with about 24,900 for 1930-31 and 23,100 in 1929-30. Only small quantities were shipped to the United Kingdom; prices were disappointing and inquiry dull. The quality of the fruit left little to be desired; practically all sorts, including Malagas and Ribiers, arrived in good condition. Emperors were received in both lugs and chests, but did not begin to create much interest until very late in the season. The Spanish Almeria crop was not only large, but quality, on the whole, was very good. Prices were low, but, for some unexplainable reason, there was very little interest in grapes of any description. In addition to large supplies of Almerias and the very light offerings from California, fairly substantial shipments were made from Greece, Crete and Russia. The supplies received from Crete and Greece were quite good, but they met with no better success than fruit from other sources. The Russian grape made very slow headway. It was not particularly attractive and shattered badly from the stem.

Late shipments of Emperors struck a better market and enabled importers to clear at a slight profit. However, a steady supply of grapes was available throughout most of the season; shipments from South Africa, Argentina and Australia were in sufficient quantity to satisfy the needs of the market.

The Emperor is undoubtedly our best export grape. It carries well and serves the purpose of the retailer. It can be worked in splendidly for display purposes and should continue to grow in favor. This past season, being an abnormal one, should not be regarded as an index governing future policies. The Emperor has a good reputation and, although conditions may justify reduced shipments, they should not be discouraged altogether.

## GRAPES: Total exports by months, 1929-30 to 1931-32

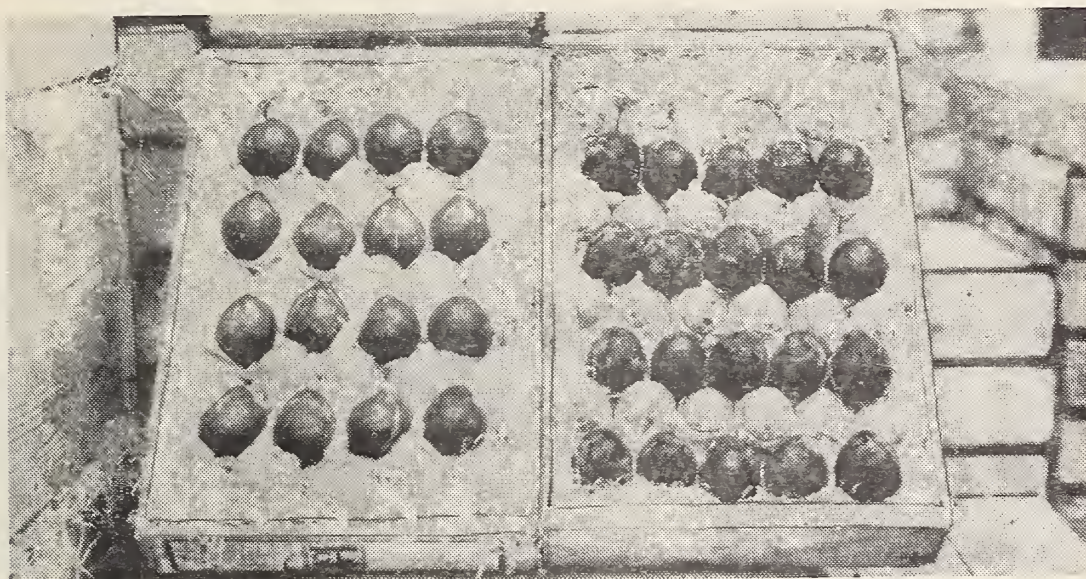
Month	1929-30	1930-31	1931-32
	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>
July.....	488,980	820,648	1,783,003
August.....	3,859,439	4,915,791	6,266,122
September.....	9,439,847	10,645,611	4,124,374
October.....	16,539,968	14,265,720	4,304,345
November.....	11,836,673	10,868,397	7,700,855
December.....	2,369,546	5,859,074	2,273,728
January.....	763,444	1,655,916	662,199
February.....	480,181	323,888	191,001
March.....	168,379	128,589	99,903
April.....	115,822	79,156	66,872
May.....	42,465	36,355	57,562
June.....	53,584	199,992	83,225
Total.....	46,158,328	49,799,137	27,613,189

Compiled by the Foreign Agricultural Service from the Monthly Summary of Foreign Commerce of the United States.

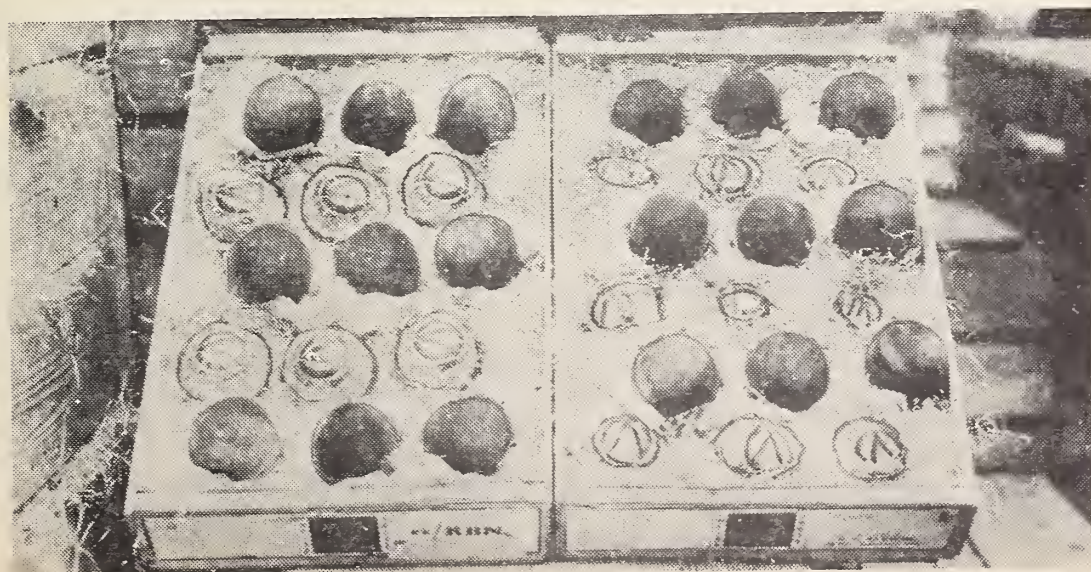




A SHIPMENT OF CHILEAN NECTARINES AND THEIR GOVERNMENT REPRESENTATIVE



SOUTH AFRICAN PLUMS: "WICKSON", LEFT; "SANTA ROSA", RIGHT



SOUTH AFRICAN PEACHES: "PEREGRINE"



